



Marguerite Casey Foundation 2009 Impact Assessment Report

Building a Movement for America's Families

July 2011

Dear Friends and Colleagues:

I am pleased to share Marguerite Casey Foundation's first impact assessment report. This report for 2009—and the reports that will follow annually—reflect our commitment to assessing the foundation's work over time and communicating the results so that we can continuously learn and improve.

Marguerite Casey Foundation, along with its grantee partners and constituents, is building a movement for America's families. We seek prosperity for all families, through policy and systems change, through a shift in the public discourse about and perception of families, and through the leadership of the families themselves. In our efforts to nurture and support this movement, we strive to put families first.

Measuring how we are doing this work and measuring the work's impact are complex tasks because few precedents exist for evaluating comprehensive community-based change efforts supported by foundations. This report provides data, both quantitative and qualitative, so that we can measure, over time, the impact of our work and the collective power of our grantee partners as they engage families in communities to bring about change.

In 2009, in the midst of the Great Recession, Marguerite Casey Foundation awarded more than \$14 million in core grants and paid out \$23 million in all grants to organizations in five regions and nationally. These organizations struggled, as did families in their communities, as the economic downturn drained resources and expanded need. Yet, our grantee partners—sustained by the foundation's flexible general operating support and their own efficient use of resources—provided issue education and leadership development to more than 1.5 million adult and youth community members, and turned out almost three-quarters of a million adult and youth community members at public actions, events or meetings.

Grantees made it a priority to collaborate with other organizations in the nonprofit sector and to build partnerships with the private and public sectors as well. They conducted policy campaigns to bring about change—at the neighborhood and community levels to state, regional and national levels—achieving wins and building their capacity to improve the well-being of all of America's families.

This report would not have been possible without the time and effort spent by our grantees completing a detailed survey about their work in 2009. We greatly appreciate their sharing of information so that we can learn from their experience. We present this report in recognition of their work and are proud to partner with them to make a difference in the lives of America's families.

Sincerely,



Luz Vega-Marquis
President & CEO



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Introduction

Each year, the Marguerite Casey Foundation impact assessment report aggregates evaluation information collected through several vehicles into a single account to assess the impact of the foundation's grantmaking. As a companion to the annual report, the impact assessment report serves to create a shared understanding between board and staff as to the performance of the foundation's grantmaking portfolio. The report also presents what we have learned during the year and how we use that learning to hold our grantees and ourselves accountable for good stewardship of foundation resources.

The report focuses on three components critical to understanding the foundation's work: grantmaking impact; grantmaking context; and financial operations, as outlined below. For each of these components, we developed the following substantive sections and questions to be addressed.

Grantmaking Impact

Grantmaking: Where did we make grants in 2009? What are the characteristics of the constituencies served by grantees? What strategies did grantees use to engage families?

Outcomes: What outcomes did grantee organizations achieve in 2009? What progress was made in the areas of organizational capacity, grassroots leadership development, network development, policy impact and family engagement?

Grantee Relations: How do we interact with grantees and how do grantees perceive the foundation?

Learning and Improvement: What have we learned from our grantmaking, and what improvements have we made to our strategy?

Grantmaking Context

Indicators of Family Well-Being: How are families across the country – particularly in our grantmaking states – doing in the areas of economic security as well as educational attainment and achievement?

Financial Operations

Assets and Investment Allocation: How are our investments performing?

Expenditures: What are our total expenses and categorical expenditures?

We recognize that to measure the foundation's impact requires a clear articulation of what we hope to achieve in our grantmaking at the aggregate level, the regional level and at the level of individual grants. We also recognize the challenges inherent in assessing our work: namely, deciding on indicators of success; employing both qualitative and quantitative measurement; tracking impact within a larger social and political context; and encouraging a culture of inquiry, analysis and ongoing improvement while staying true to our founding vision and mission.

We believe that the annual impact assessment report provides the foundation with a basis for tracking our progress. The yearly benchmarking process allows us to target our impact and make improvements on the way to accomplishing our mission to help low-income families strengthen their voice and mobilize their communities in order to achieve a more just and equitable society for all.

Sources of Data

Grant Reporting Forms: The primary source of data for the section on grantmaking is our internal GIFTS® database, which includes information collected from grant proposal guidelines, application forms, progress reports and final reports submitted by grantees.

Grantee Survey: The primary source of data for the section on outcomes is the annual grantee survey, distributed online in June 2010 to general-support grantees active in 2009 (N = 207). The survey comprised 25 questions and, unless indicated otherwise, referred to the organizations' activities in the calendar year 2009. There were 169 completed surveys submitted for a response rate of 82 percent. The survey was hosted and the results compiled by Evaluation & Research Associates, a consulting firm located in the Seattle area.

Closeout Reports: A detailed closeout report is prepared for each grant at the end of its funding period. The report provides an overview of grantee activities and a discussion of how the organization met the objectives it set for the grant period. The closeout reports serve as a record of the accomplishments of our grantees, as well as the rationales used for renewing or not renewing grants. In 2009, 100 grants closed.

Grantee Perception Report®: For data on grantee relations, we commissioned The Center for Effective Philanthropy (CEP) to gather feedback from the foundation's grantees through the center's online assessment tool, the Grantee Perception Report®. The aim of the Grantee Perception Report® is to provide comparative feedback to funders based on the perceptions of grantees. The online survey was sent to 241 grantees in October 2009. Two-thirds (67 percent) of the grantees completed the survey.

Indicators of Family Well-Being: The data for each of the indicators were obtained from publicly available sources (primarily American Community Survey and other Census-related databases). The information was compiled by a doctoral student in social welfare at the University of Washington under contract with the foundation.

Financial Operations: Data on our investment performance are provided to us by an outside investment consulting firm. Data on expenditures are included in our GIFTS® grants-management database.



Grantmaking Impact

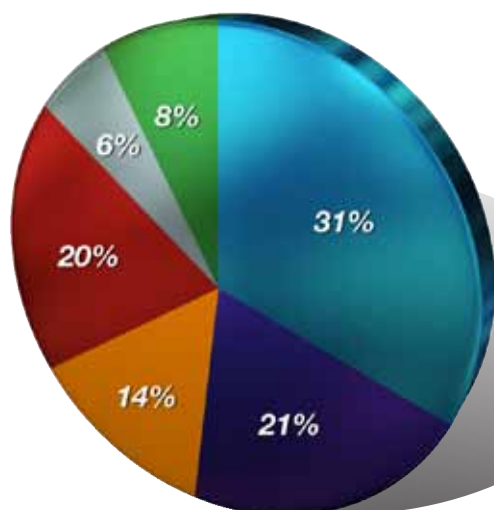
GRANTMAKING

Most of Marguerite Casey Foundation grants are multiyear grants that provide general rather than project-specific support. This section includes information on the characteristics of grants awarded in 2009, grants that closed during that year and characteristics of the organizations that had an active grant in 2009.

Characteristics of Grants Awarded

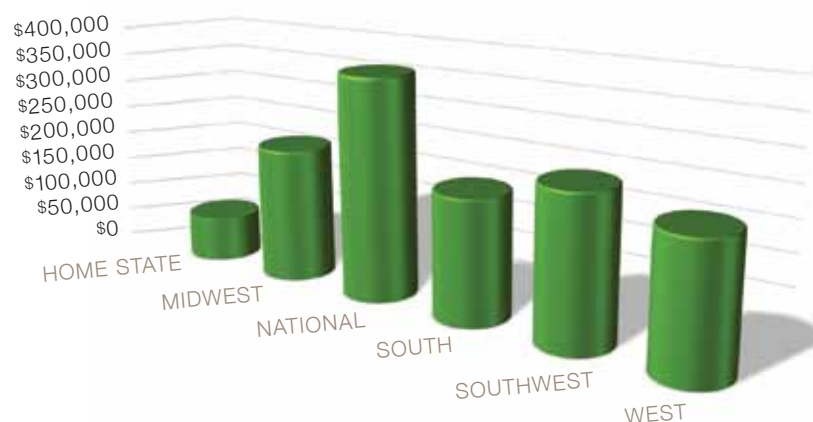
Marguerite Casey Foundation awarded 78 grants in 2009, 88 percent of which were for renewed support; the remaining 12 percent went to new partner organizations. The breakdown of grants awarded in 2009 by region is as follows:

■ Grants awarded by region, 2009



Region		Grants Awarded
Home State	●	\$810,000
Midwest	●	\$1,225,000
National	●	\$4,580,000
South	●	\$3,125,000
Southwest	●	\$1,985,000
West	●	\$2,880,000
Total		\$14,605,000

■ Average grant size, 2009



The average grant size varied by region, as shown in the chart at left, with the largest grants going to national organizations, and the smallest awarded within the Home State Fund.






Please note: The Home State Fund portfolio has since undergone significant refinement; 2010 data will reflect this shift towards larger grants to fewer organizations in Washington state.

Grants That Closed in 2009

One hundred grants closed in 2009. Sixty-seven of the grants (67 percent) were renewed; 33 grants (33 percent) were not. The regional breakdown of 2009 closed grants is as follows:

- Home State – 18 grants
- Midwest – 8 grants
- National – 28 grants
- South – 16 grants
- Southwest – 12 grants
- West – 18 grants

Marguerite Casey Foundation does not accept unsolicited proposals. Program officers are expected to be well-versed in the work going on in their respective regions, and they conduct outreach to prospective organizations. Prospective grantees, working with the program officer for their region, establish three to five objectives for the proposed grant period. Those objectives provide a way to measure the organizations' achievements during the grant period. Each grant, whether support is renewed or not, has a closeout report prepared which includes an evaluation of how well the organization achieved its objectives. The scale for achievement of objectives is as follows:

<i>Achievement of Objectives Scale</i>	
	Exceeded objectives
	Achieved all objectives
	Achieved most objectives
	Achieved a few objectives
	Achieved no objectives

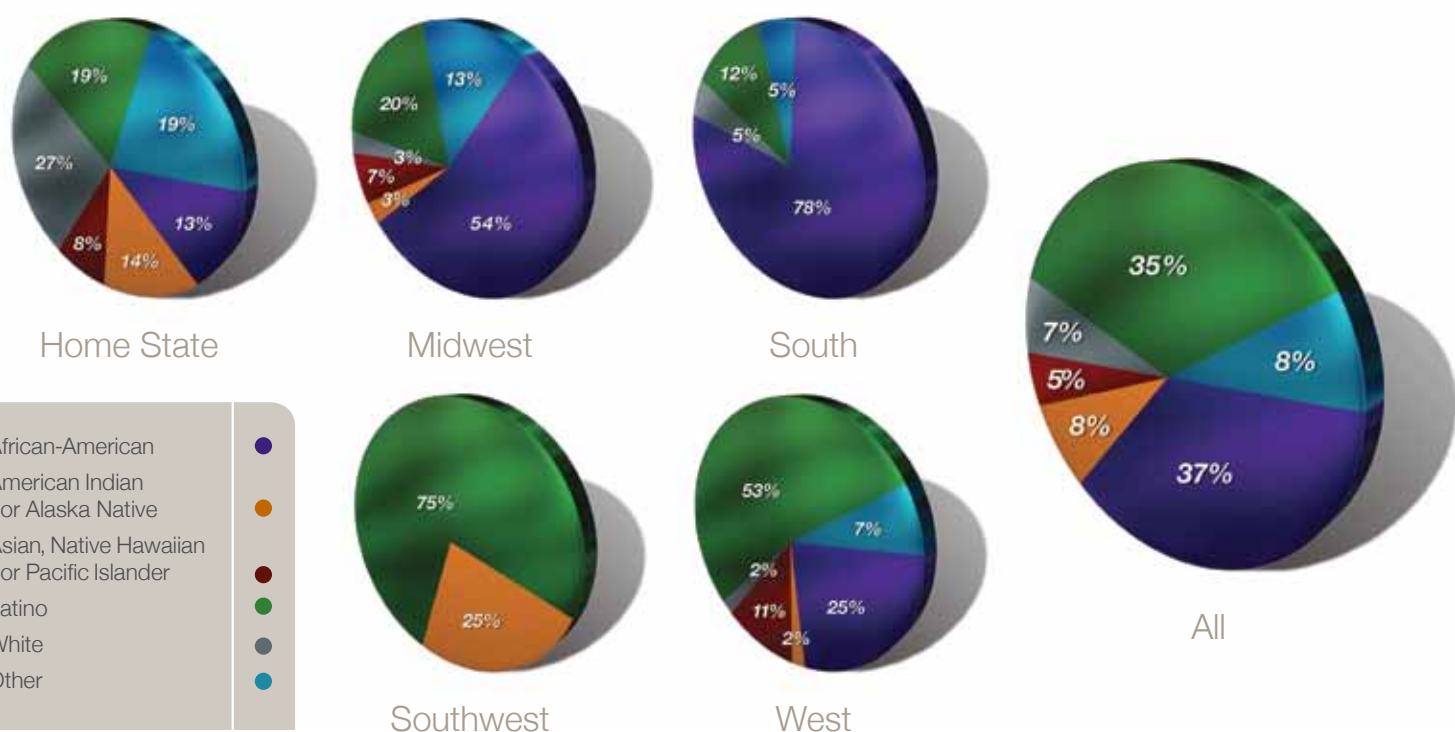
For the 100 grants that closed in 2009, approximately two-thirds (66 percent) of the organizations achieved all of their objectives: 7 percent exceeded their objectives; 17 percent achieved most of their objectives; and 5 percent achieved a few objectives. Five of the groups (5 percent) were categorized as “achieved no objectives” because they did not submit any progress reports to the foundation.

The foundation did not renew one-third of the grants ($n = 33$) that closed in 2009; 12 were not renewed because the original awards were intended as one-time project or initiative support; five because of limited funds and refinement of the Home State portfolio; and eight because of leadership issues in the organizations, including departures of executive directors, which left the grantees unable to meet their grant objectives. Finally, the foundation did not renew eight organizations that had not incorporated movement building principles - such as working in partnership with other groups or moving from direct service to advocacy and activism - into their work.

Characteristics of Grantees

In 2009, 247 organizations had grants that were active during some part of the year. As part of the foundation's grant application, prospective grantees are asked to describe the demographics of the constituencies who directly benefit from their work. The regional grantees with active grants in 2009 by primary race/ethnicity constituency are presented below:

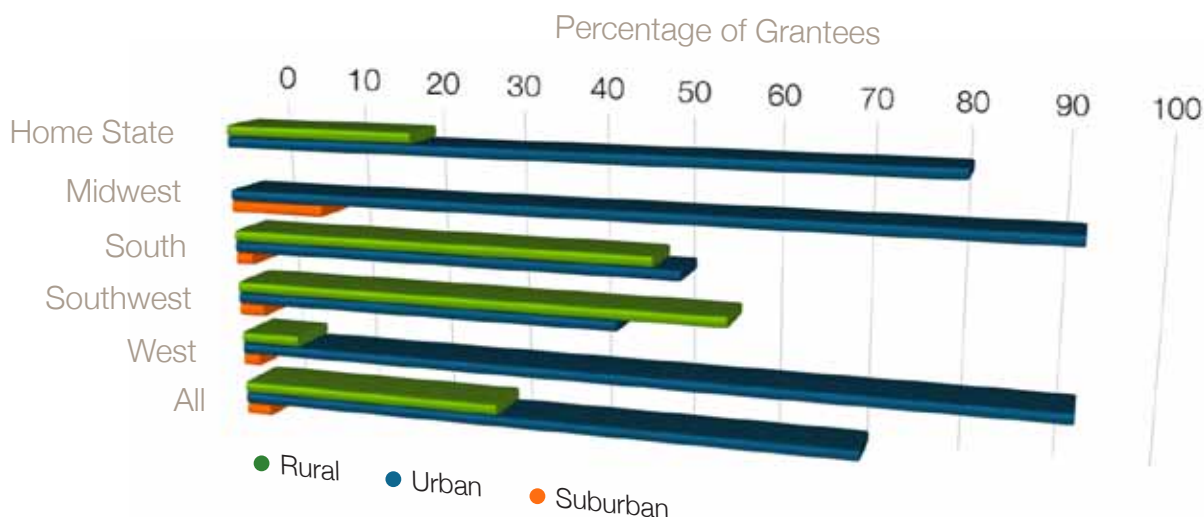
Regional grantees by primary race/ethnicity constituency, 2009



Fully three-quarters (75 percent) of the Southwest grantees worked primarily with Latino families, compared to approximately one-half (53 percent) of the West grantees, down to 12 percent of the South grantees. In comparison, more than three-quarters (78 percent) of the South grantees report working primarily with African-American families, compared to 13 percent of the Home State grantees and none of the groups in the Southwest. The differences reflect the relative race/ethnicity and poverty demographics of the regions. Overall, 93 percent of the grantees report that they work primarily with communities of color, which is an indicator of our commitment to racial and ethnic diversity in our grantmaking.

Grantees are also asked to report on the primary geography of their constituents. More than two-thirds of the grantees (69 percent) report that they serve an urban population, with 28 percent serving a rural population and the remaining 2 percent working with a suburban constituency. The South and the Southwest grantees are more balanced between rural and urban than the grantees in the Midwest, West and Home State are.

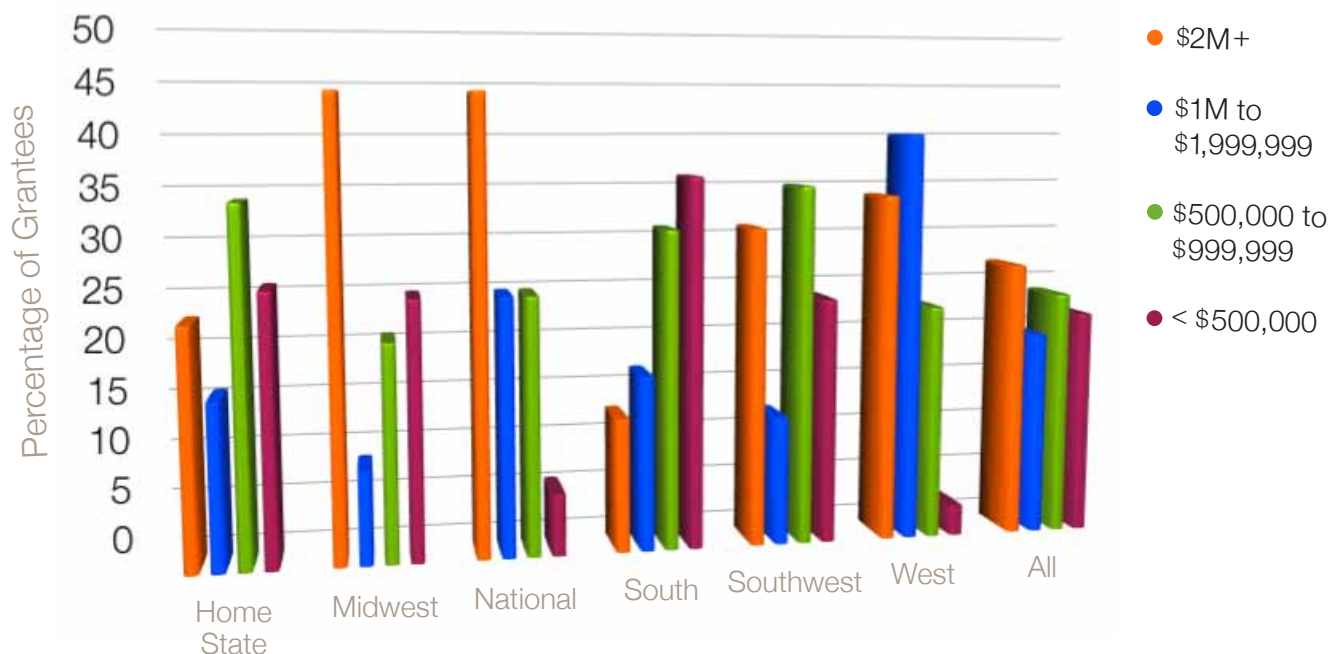
Regional grantees by primary geography, 2009



Overall, almost three-quarters (72 percent) of the regional grantees reported that they worked with immigrant families. The percentage varied by region, from a high of 93 percent for the West grantees to 72 percent of the Southwest grantees, 66 percent of the Midwest grantees, 65 percent of the Home State grantees and 63 percent of the grantees in the South portfolio. Almost one-third (30 percent) of the regional grantees reported that their constituencies are primarily (more than 50 percent) immigrants.

Our grantees vary in size - from large national groups to small - but are still cornerstone groups in otherwise underserved communities. The range of annual operating budgets for grantees active in 2009 is presented in the table below. Overall 48 percent of the grantees had operating budgets of at least \$1 million.

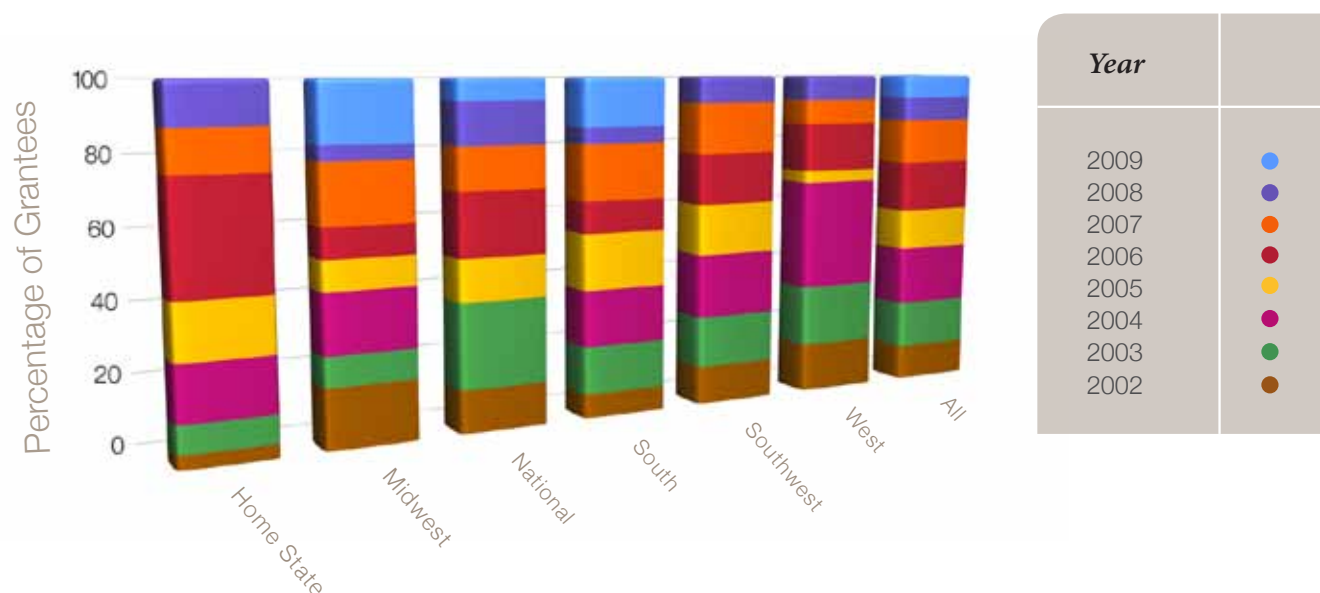
Grantee budget range, 2009



Grantees were asked in the foundation’s annual survey if they identified themselves as an *intermediary organization*, defined as one that provides services to other organizations, but does not work directly with constituents. Twenty percent of the groups identified themselves as intermediaries. As expected, National grantees were most likely (53 percent) to identify themselves as intermediaries, followed by Home State grantees (27 percent), South grantees (22 percent), Midwest grantees (14 percent), Southwest grantees (12 percent) and West grantees (7 percent).

Marguerite Casey Foundation awards multiyear grants, with no limit on the number of times the grants can be renewed. Its first full grant year was 2002. When asked when they received their first grant from the foundation, 11 percent of the grantees responded that their first grant was in 2002. More than one-half of the grantees (57 percent) had been partners with the foundation for at least five years. The breakdown by region is presented below:

■ Year of first grant



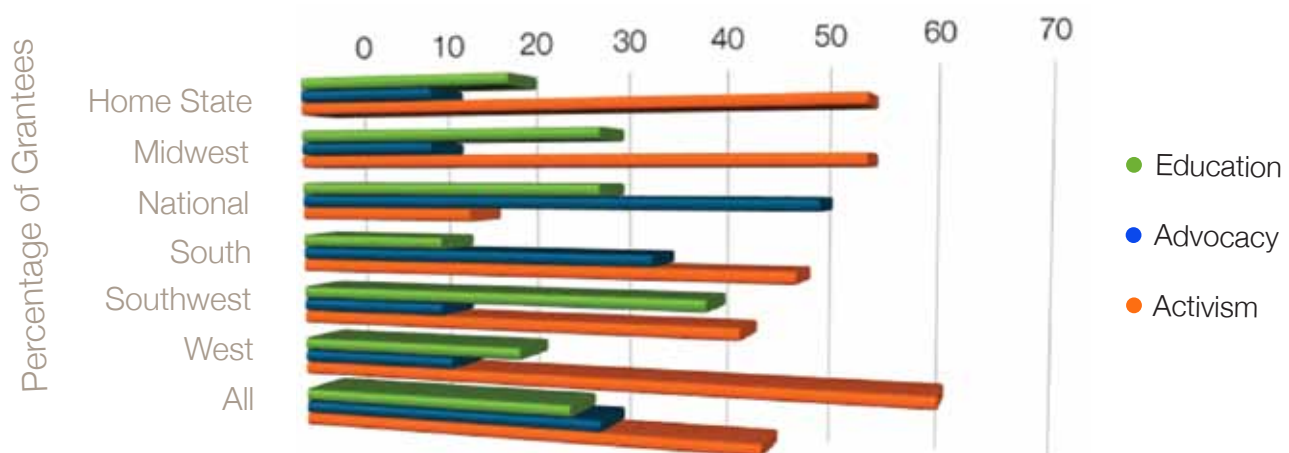
Strategies Employed by Grantees

The program officer overseeing the grant recommendation categorizes the prospective grantee by the primary strategy it uses in its work: education, advocacy or activism. There is no standardized definition for each category; rather the program officers determine the category in which each organization belongs based on a broad set of key elements. For example, the education category has generally been intended for organizations—(including those who provide direct services)—that provide issue education and leadership development programming to community members. The advocacy category is intended for groups that engage in policy advocacy that may or may not be rooted in communities. The activist category includes organizations that have explicitly built a base of families engaged in activities that may include policy advocacy.



The breakdown by strategy of grantees active in 2009 is presented below. Overall, 45 percent of the grantees were categorized as employing primarily an activism strategy; 29 percent, advocacy; and 26 percent, education. Sixty-one percent of the West grantees were categorized as having an activism strategy whereas only 18 percent of the National grants were categorized as such. National grantees were the most likely (51 percent) to be categorized as having advocacy as their primary strategy as they primarily provide resources to local and regional groups rather than building a base of families themselves. The Southwest region had the highest proportion (41 percent) of grantees classified as having an education strategy; the South at 15 percent had the lowest proportion.

Grantees by primary strategy, 2009



OUTCOMES

We evaluate the collective progress of our grantees on outcomes we think are critical to movement building. Those outcomes are:

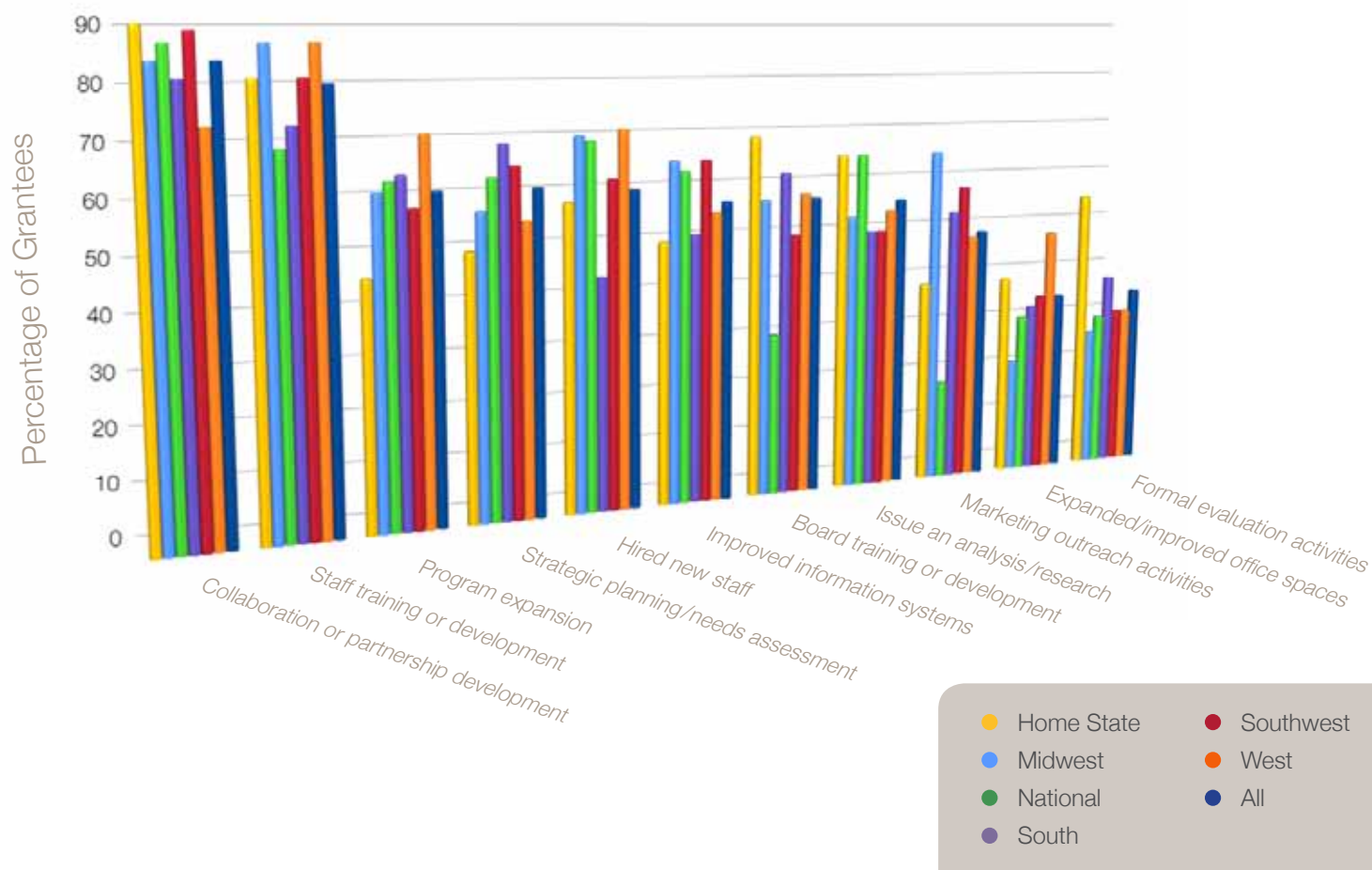
- Organizational capacity
- Leadership development
- Network development
- Policy impact
- Family engagement

For each of the outcomes, we track indicators of progress that measure success. The primary source of comprehensive data on those indicators is our annual grantee survey. The survey gathers qualitative and quantitative information which is then aggregated to provide direct measures of the effectiveness of our and our grantees' work. The results for grants active in 2009 follow.

Organizational Capacity

Marguerite Casey Foundation provides general operating support because we believe such support helps grantees build organizational capacity and effectiveness. The grantee survey asked grantees how they built organizational capacity in 2009. Respondents could select all that applied from eleven options; the results are shown below.

How grantees built organizational capacity, 2009



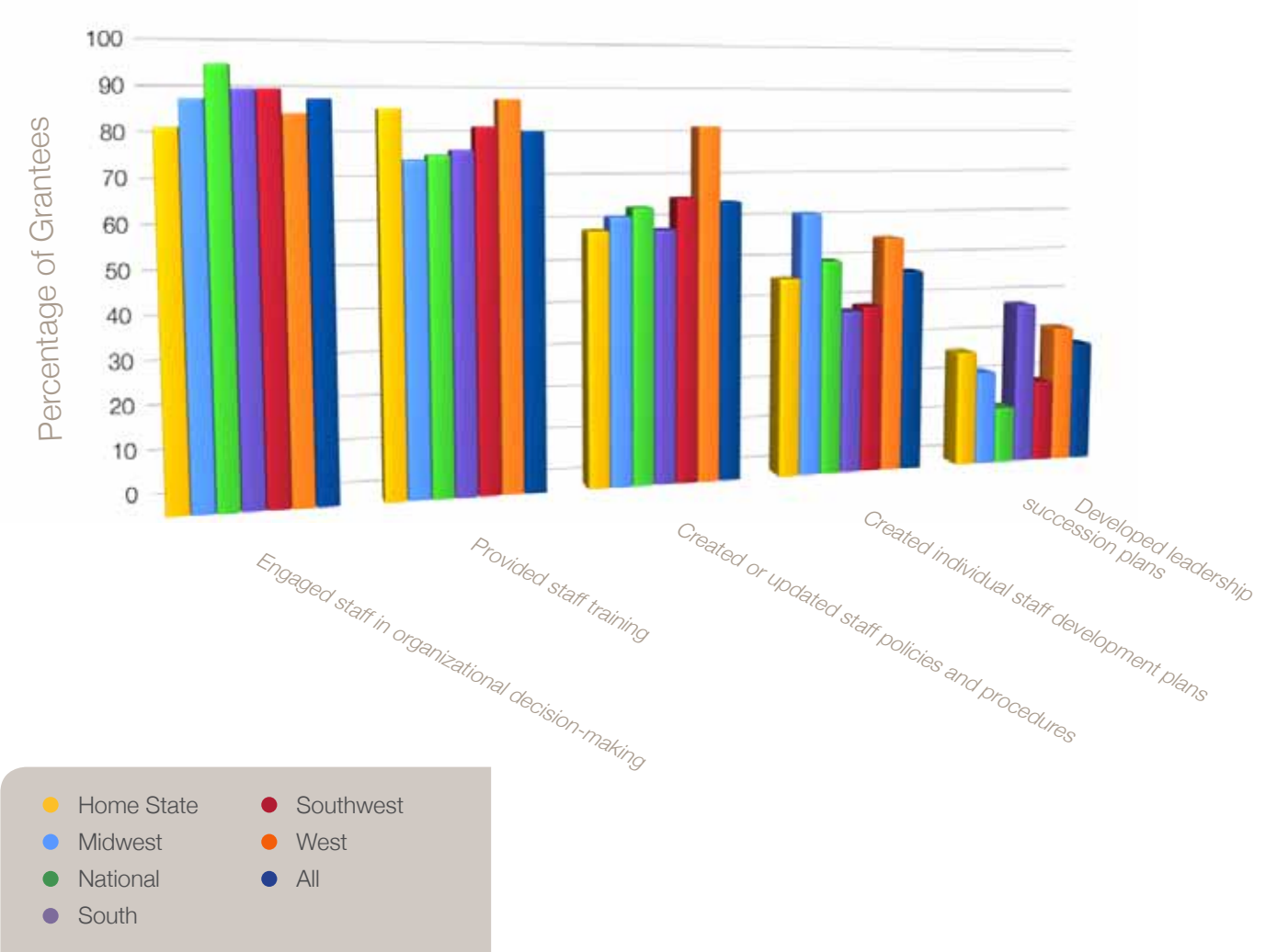
Developing partnerships or collaborations was the most frequent way in which grantees built organizational capacity (84 percent of respondents), a clear sign of progress in movement building. Organizations were also highly likely (80 percent) to build capacity by training or developing staff.

When grantees were asked what types of staff development activities they had engaged in during the year, the most common responses were:

- Engaged staff in organizational decision-making (87 percent)
- Provided staff training (80 percent)
- Created or updated staff policies and procedures (64 percent)

The complete breakdown by region is displayed in the chart below:

■ Staff development activities, 2009

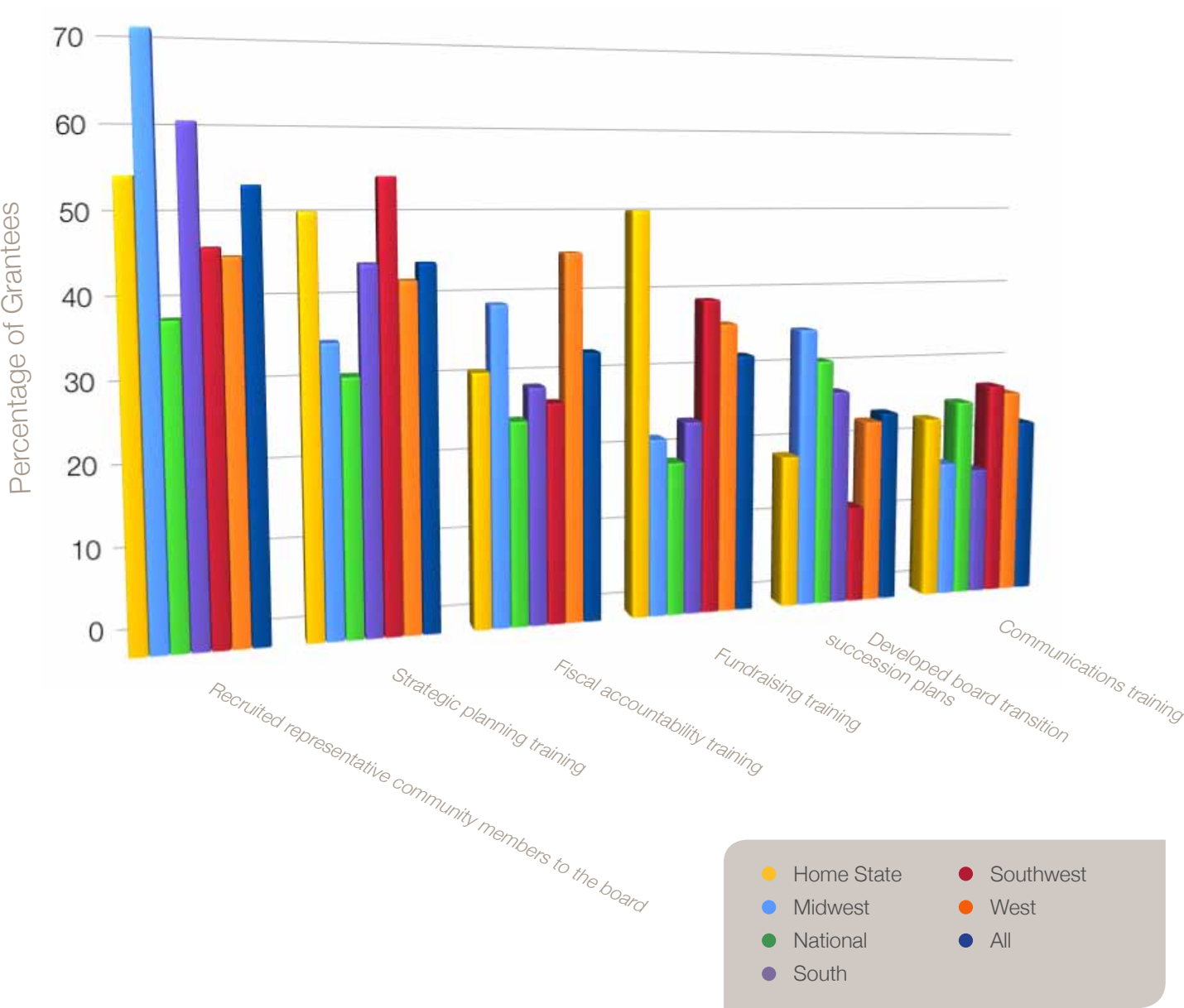


The most commonly cited board development activities were:

- Recruited community members to the board (53 percent)
- Strategic planning training (44 percent)
- Fiscal accountability training (33 percent)
- Fundraising training (32 percent)

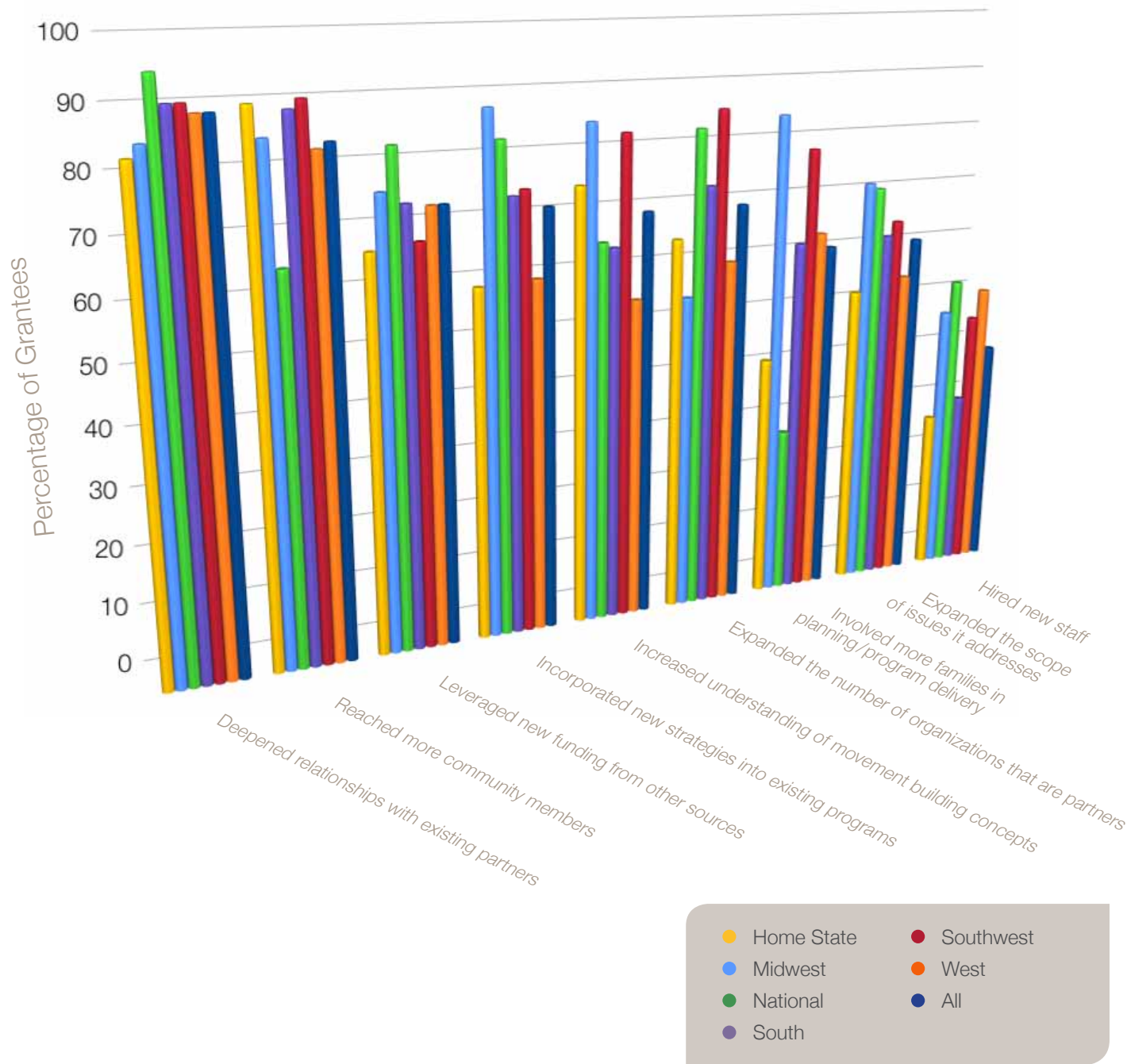
The complete breakdown by region is displayed in the chart below:

Board development activities, 2009



When asked to complete the sentence “*As a result of Marguerite Casey Foundation support in 2009, my organization...*,” grantees cited a number of ways in which support had an impact.

■ “As a result of Marguerite Casey Foundation support in 2009, my organization...”



Grantees' responses confirm that they are using general support in ways that promote movement building. In particular, 87 percent of grantees used support to deepen relationships with existing partner organizations, and more than two-thirds (68 percent) used support to expand the number of organizations that are partners. Eighty-three percent of the respondents confirmed that support enabled them to reach more community members, and 59 percent involved more families in organizational planning and program delivery. Seventy-one percent of the grantees built capacity by leveraging new funding from other sources.

Demographic shifts in age and culture have an impact not only on communities, but also on nonprofits that work in the communities. To be effective, community organizations must embrace diverse ideas and work across generations and cultures. Our survey asked grantees how their organizations promoted their own workforce diversity in 2009. Of those grantees that responded, most (78 percent) described their efforts in terms of outreach and recruitment in hiring to achieve workforce diversity. The dimensions of diversity noted included race/ethnicity, gender, age (with an emphasis on recruiting youth), sexual orientation, disability, language, income, culture and geography. A consistent theme was that groups strive to reflect the communities and constituents they serve.

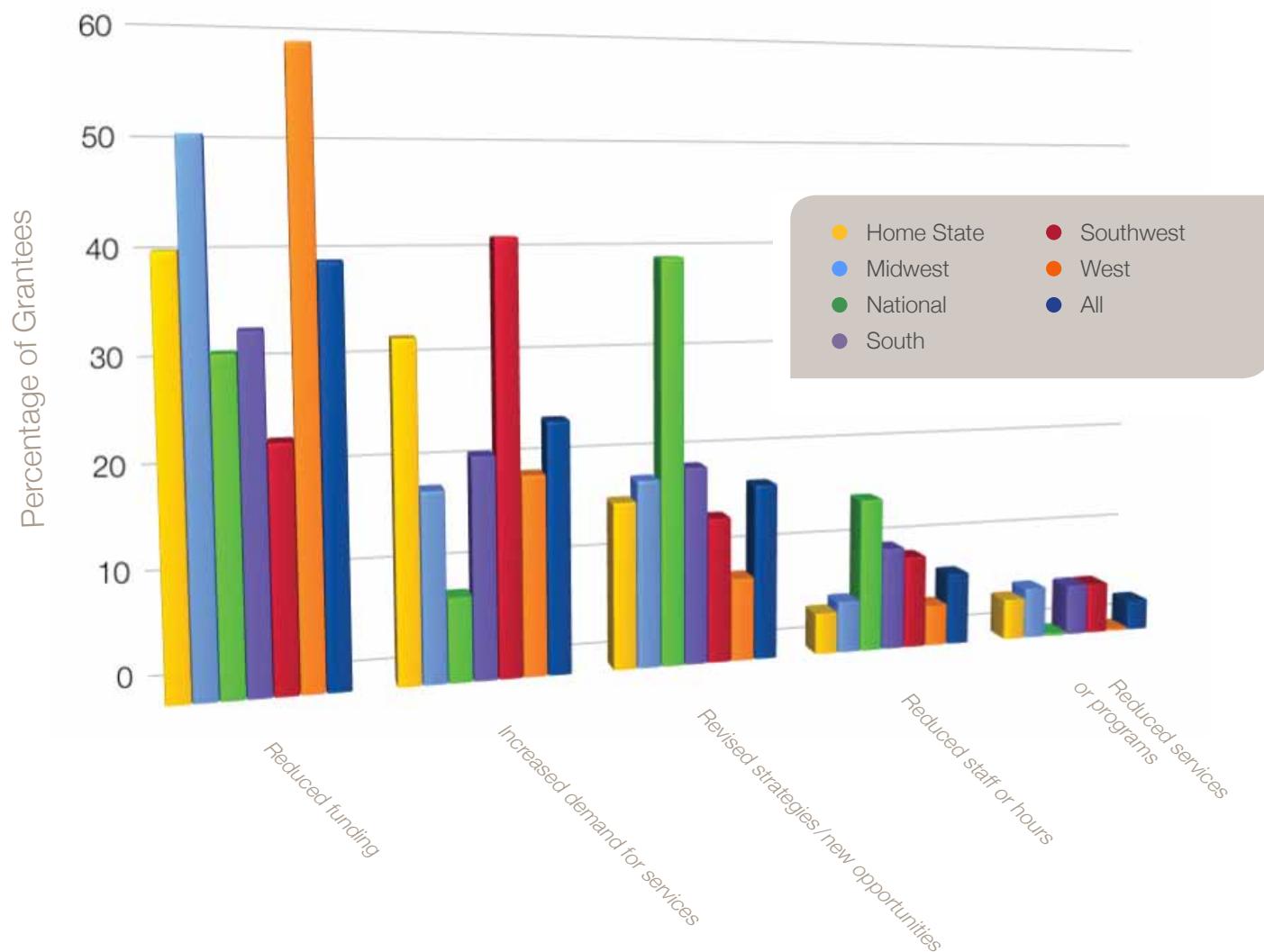
Other processes grantees used to promote workforce diversity included training for staff and volunteers and the promotion of diversity through reports, websites, conferences and presentations.

The economic downturn that peaked in 2009 has had a profound impact on the nonprofit sector. We asked grantees what area of their work was most affected by the economic downturn. As shown in the following chart, the greatest impact was in reduced funding (39 percent), coupled with increased demand for services (24 percent). However, few grantees (7 percent) reported reduction of staff or hours as the greatest impact, and only 3 percent reported reduction of services/programs as the greatest impact, demonstrating the resiliency of our grantees. Seventeen percent of the grantees reported that the greatest impact of the economic downturn on their work was to force them to revise their strategies and/or seek new opportunities, a testament both to the capacity of the organizations themselves as well as to the availability of flexible operating support.





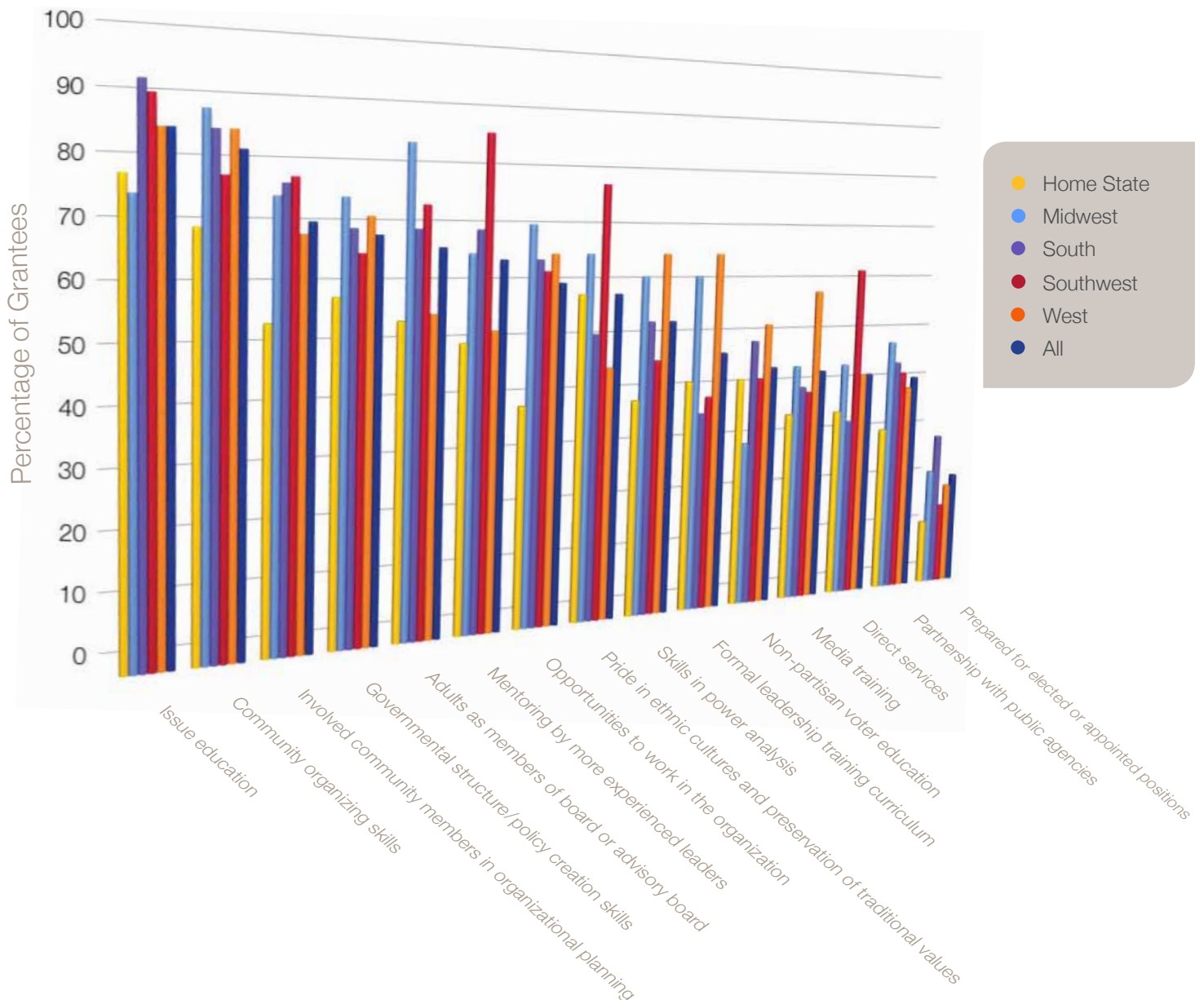
Area of work most affected by economic downturn, 2009



Leadership Development

The development of authentic leadership in communities is an important component in movement building. We fund organizations that build a base of grassroots leadership in many ways, from formal leadership development programs that may take place over several months to a year, to informal, one-time community meetings to introduce families to the principles of leadership in their communities. Some organizations focus on developing parent leaders while others work directly with students and young people to empower youth to take on leadership roles. When asked how their organization developed skills and leadership among adult community members, grantees indicated that they employed several approaches. The responses of regional grantees (National grantees do not necessarily work directly with families in communities) are presented in the following chart.

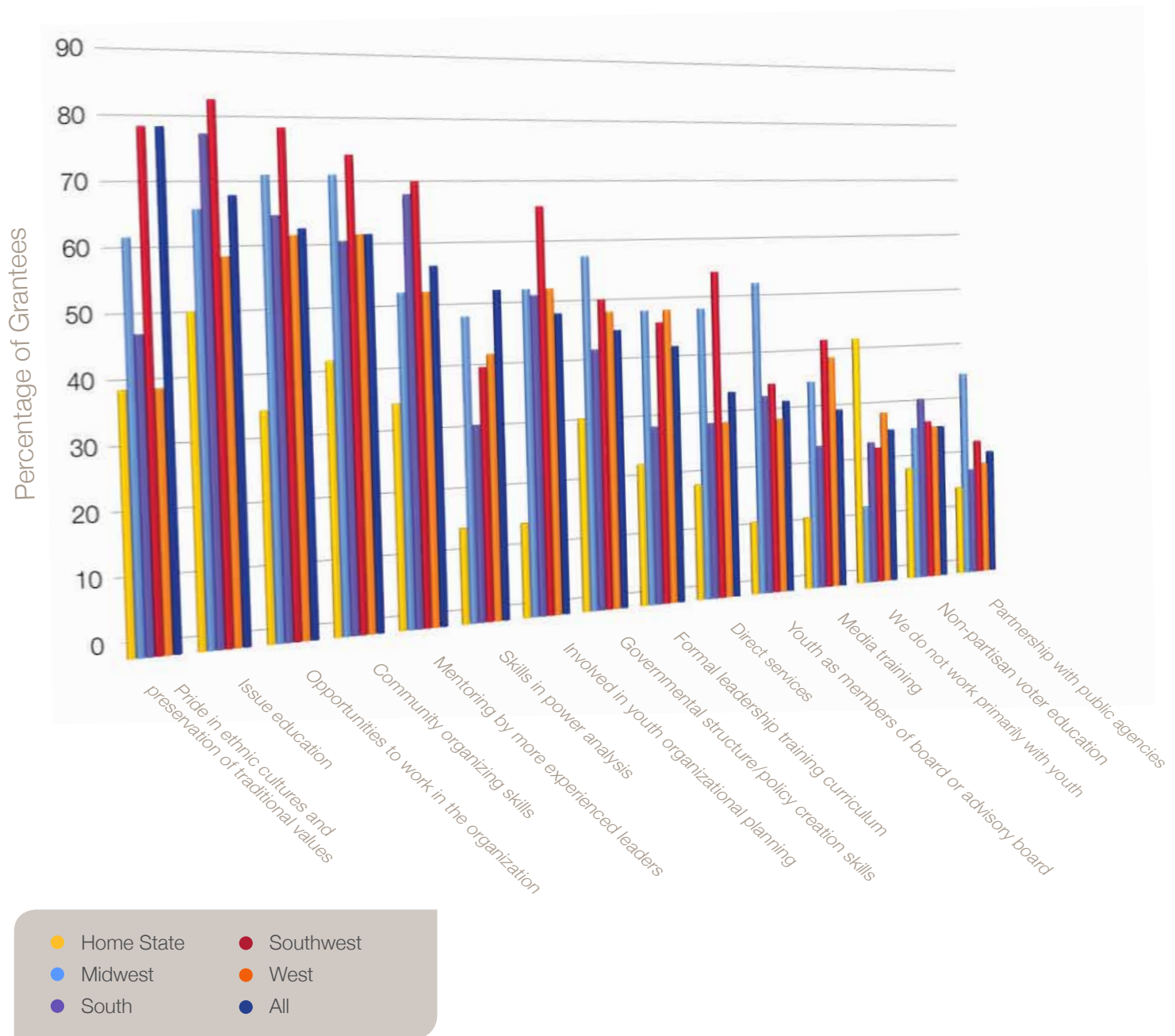
Adult leadership approaches used, 2009



Note that although fewer than half of the grantees (47 percent) had a formal leadership development curriculum, most of the grantees (84 percent) used issue education to develop leadership among adults in their communities. Grantees were also likely to develop skills in community organizing (81 percent) among adults, along with skills in policy creation and change (68 percent). Seventy percent of the grantees involved community members in organizational planning, and 66 percent involved community members as board or advisory board members. It should also be noted that 44 percent of the grantees provided nonpartisan voter education to community members in 2009.

Seventy-four percent of grantees reported that they work with youth as well as adult community members. Forty-two percent provided a formal leadership development curriculum for youth and two-thirds (67 percent) provided issue education to youth in their communities. Sixty-one percent of grantees reported that they worked to develop skills in community organizing among youth, while 62 percent provided opportunities to work in the organization and 56 percent provided mentoring by more experienced leaders. Survey results by region are presented in the next chart.

Youth leadership approaches used, 2009



In the survey, grantees were also asked to report on the number of community members (adults and youth) they engaged in leadership development in 2009. We focused on four indicators of leadership that run along a continuum from initial issue education to becoming a core leader who regularly participates in the organization's planning meetings, task forces or public events, as well as board membership. The numbers of leaders developed are presented in the table on the next page. These numbers should be considered low estimates as they were collected from the 82 percent of active grantees that completed the annual survey for 2009.

Adult and youth leaders, 2009

		Home State	Midwest	National	South	Southwest	West	All
Number of people educated about issues that affect them	Adults	151,486	14,771	600,955	433,951	58,482	50,962	1,310,607
	Youth	3,630	4,015	15,649	61,709	10,979	10,283	106,265
	Total	155,116	18,786	616,604	495,660	69,461	61,245	1,416,872
Number of people who participated in leadership development training	Adults	4,446	4,137	9,217	11,823	13,377	34,465	77,465
	Youth	2,338	508	11,568	4,731	2,825	1,402	23,372
	Total	6,784	4,645	20,785	16,554	16,202	35,867	100,837
Number of people who turned out at public actions, events or meetings	Adults	31,781	16,027	429,654	62,943	41,749	32,858	615,012
	Youth	5,007	4,345	87,681	17,089	7,840	7,595	129,557
	Total	36,788	20,372	517,335	80,032	49,589	40,453	744,569
Number of core leaders developed (people who regularly participate in planning meetings, task forces, public events, or are board members)	Adults	2,132	1,161	2,925	5,822	1,140	7,731	20,911
	Youth	245	308	522	3,994	496	612	6,177
	Total	2,377	1,469	3,447	9,816	1,636	8,343	27,088

According to the estimates cited, in 2009, almost 1.5 million community members were educated about issues that affect them, with more than 100,000 participating in leadership development training. Almost three-quarters of a million people turned out at public actions, events or meetings. And, our grantees developed more than 27,000 core leaders in communities across the country. The ripple effect of those core leaders in terms of other community members empowered and their engagement in policy change is difficult to measure, but the numbers alone attest to the impact of the work of our grantees.

Network Development

Our belief is that strategic networking, especially the connection of grantee organizations within and across regions, is a critical component of movement building. We support organizations that have as their goal the building of networks and alliances to share knowledge and best practices, to organize constituencies of low-income families and to pursue policy advocacy campaigns for change.

The annual grantee survey included several questions regarding how grantees communicate with other organizations as well as their constituents as a component of network and partnership development. Grantees were asked how they had shared their work and/or best practices with other organizations and communities in 2009. As seen in the chart on the next page, almost all (92 percent) of the grantees who responded use face-to-face meetings as a method of communication, followed by a website (83 percent), e-mail alerts (77 percent), telephone/conference calls (73 percent) and convenings/conferences (73 percent). More than one-half (57 percent) of the organizations used publications to share news of their work.

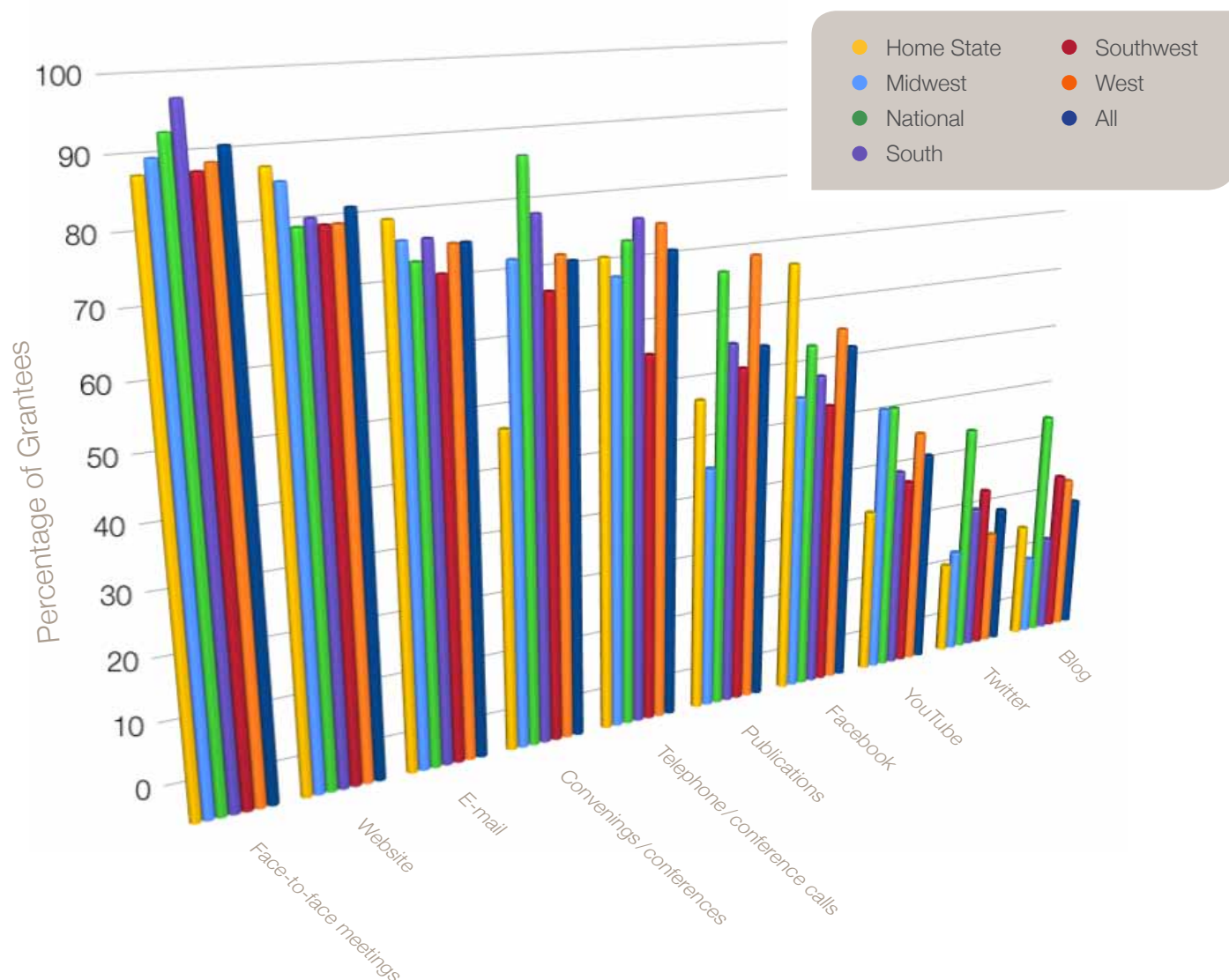
Social media represent an expanding area of communications for the foundation as well as its grantees. More than one-half (55 percent) of grantees use Facebook, more than one-third (35 percent) use YouTube and about one-fourth (23 percent) use Twitter. Twenty-two percent of grantees report using a blog to share their work with others. Thus, although many grantees use social media to expand their reach, there is still room for growth.

One way that community organizations can interact with their constituents is with mobile phones and especially text messaging. Our survey asked grantees if they used mobile phones in organizing and advocacy efforts in 2009 and just over one-half (51 percent) reported that they did. Organizations that answered affirmatively were asked—in an open-ended question—how they used mobile phones.

The most common response was that organizers used them to communicate with other staff and constituents in the field. Mobile phones were also used as part of call-in and text messaging campaigns, calls to legislators, and in efforts to inform constituents about events. A few grantees reported that they used mobile phones to engage in social media, especially Twitter updates.



Methods used to share work and/or best practices, 2009

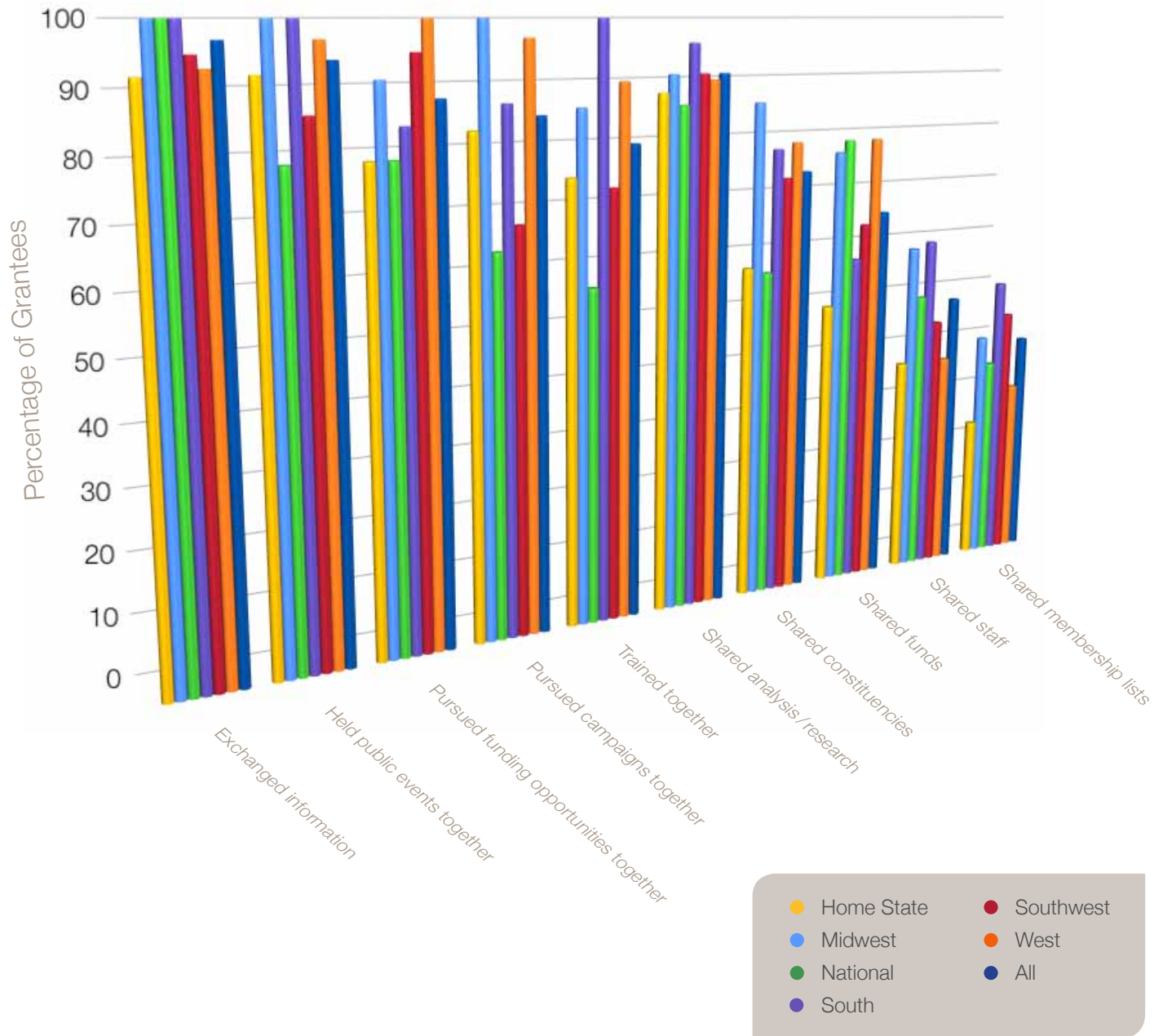


Grantees were asked to choose from a list the ways in which they collaborated with other organizations in 2009 and the number of organizations with which they worked for each method. As shown in the next chart, most grantees collaborated with other organizations in several ways.

Almost all of the grantees (97 percent) reported that they exchanged information with other organizations. Ninety-four percent of the grantees reported that they held public events with other groups, 91 percent shared analysis/research, 88 percent pursued funding opportunities with other groups, and 85 percent pursued campaigns with other organizations. Additionally, 80 percent of grantees responded that they trained with other groups and 74 percent shared constituencies.



Strategies used to collaborate with other organizations, 2009



The average number of organizations with which grantees collaborated when using the above strategies ranged from a high of 1,538 (exchanged information) to a low of three (shared membership lists). The complete results are as follows:

Average number of organizations with which grantees collaborated, 2009

Method of Collaboration	Home State	Midwest	National	South	Southwest	West	All
Shared staff	6	5	5	5	4	4	5
Shared membership lists	3	6	16	9	6	7	8
Shared funds	6	6	24	5	10	6	9
Pursued funding opportunities together	7	11	24	8	7	14	11
Trained together	29	11	15	16	26	15	18
Shared constituencies	22	9	13	15	67	7	20
Held public events together	31	18	68	20	16	18	24
Pursued campaigns together	42	32	40	24	24	46	34
Shared analysis/research	23	17	39	67	49	49	45
Exchanged information	80	69	1538	95	170	136	240

Grantees are highly likely to be affiliated with networks/coalitions that focus on advocacy activities. Overall 89 percent of grantees report they are affiliated with at least one network or coalition. On a regional basis the percentage ranges from 67 percent of National grantees to 100 percent of the Home State grantees.

Region	Percentage of Grantees
Home State	100
Midwest	82
National	67
South	91
Southwest	88
West	97
All	89

Grantee advocacy network/coalition affiliation, 2009

Grantees mentioned a total of 441 unique networks with which they are affiliated. Some networks were identified by more than one grantee for a total of 552 mentions. Equal Voice was identified by the greatest number of grantees (17), followed by the Illinois Responsible Budget Coalition (8), Grassroots Global Justice Alliance (6), and National Council of La Raza (6). What these data show is that our grantees are affiliated with a large number of local, regional and national networks that focus on advocacy activities and thus, they have a wide reach across regions, issues and constituencies.

An expanding area of opportunity for partnership development is that of cross-sector collaboration. Nonprofits interested in finding new partners with which to share solutions to social problems are looking to the public and corporate sectors. Partnerships in the areas of education, civic engagement and health care delivery are being created to share learning and move social agendas forward.

More than one-half (57 percent) of our grantees engaged in some type of cross-sector (defined as public-nonprofit and/or corporate-nonprofit) collaboration in 2009. West and Midwest grantees were most likely (64 percent) to have partners outside the nonprofit sector, followed by grantees in the Southwest (63 percent), South (55 percent), Home State (46 percent) and National (43 percent) portfolios.

Of those grantees that engaged in cross-sector work, 38 percent reported that they worked with the public sector, 27 percent worked with business or the corporate sector, and 35 percent worked with both. Examples of cross-sector work between grantees and government include the following:

- Grantees and elected officials co-sponsored events such as public hearings.
- Grantees provided diversity training to county employees.
- The Illinois Task Force for Children of Prisoners worked with the Cook County Sheriff's Office and the Illinois Department of Corrections to improve conditions for children of prisoners.
- Grantees in all regions collaborated with local school districts and boards to improve public education.
- A Home State grantee worked with city and county law enforcement on planning issues.



Examples of collaborative efforts between the corporate sector and grantees:

- In California, a grantee worked with pro-immigrant businesses to highlight the contributions of immigrants and to mobilize in support of their rights.
- Mississippi Building Blocks and business leaders advocated for high quality child care and early learning programs.
- Campaign for Fair Food engaged corporate partners to work to improve wages and working conditions for farmworkers.
- State Farm Insurance collaborated with a grantee to provide citizen application fee vouchers for legal permanent residents.
- In the Southwest, a corporate soccer league worked to set up a new league for colonia residents.
- Local business owners supported several community forums to increase community engagement in a local redevelopment effort.



Examples of partnerships that involve all three sectors:

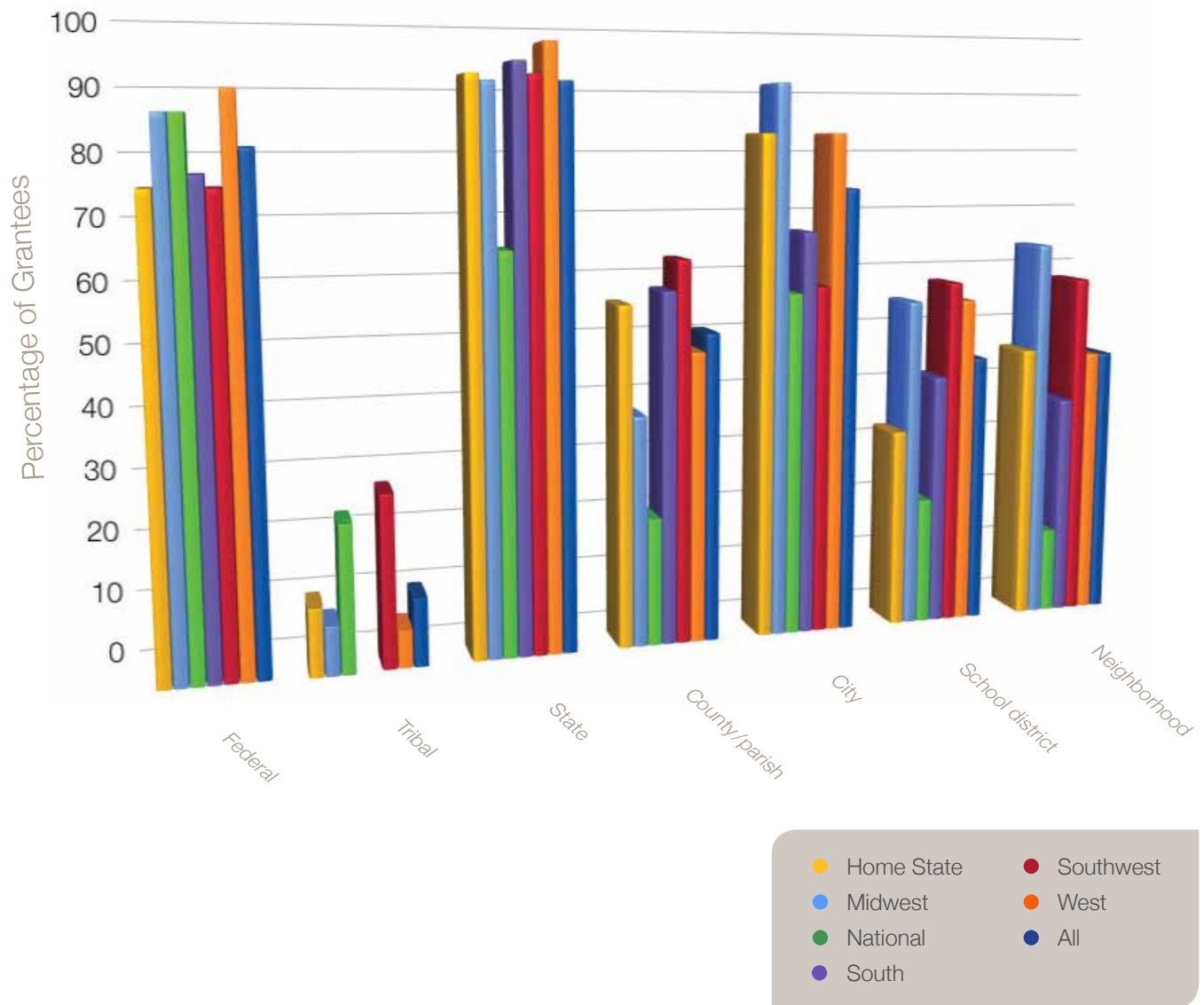
- In Southern California, the Smart Border Coalition comprises business, city and federal government representatives and community members working on the reconfiguration of the San Ysidro border crossing.
- In Los Angeles, private industry, government and nonprofit organizations have worked together to expand grocery industry investment in underserved communities.
- In the Southwest an anti-payday lending campaign initiated by grantees has had extensive government and corporate support and engagement.
- Washington Families Fund is an innovative public-private partnership that provided critical support for more than 600 units of supportive housing for families.
- Small business and government agencies have joined with nonprofit organizations to develop green jobs policies and programs in Washington state.

Policy Impact

Our approach to public policy is to support the policy advocacy efforts of our grantees and leverage the resources of the foundation to raise awareness of policy issues that affect low-income families. We do not make specific policy grants, but instead, through general support grants, give our grantees the flexibility to choose policy issues and strategies.

Our grantees do advocacy work at all levels of government and community. The percentages of grantees in each region and overall that do advocacy work at each level is as follows.

Percentage of grantees advocating at government/community level, 2009



For all grantees, state-level advocacy work was most prevalent (91 percent), followed by advocacy at the federal level (81 percent) and advocacy at the city level (74 percent). There were expected differences: For example, grantees in the National portfolio were more likely to focus on federal policy, and there was more focus on advocacy at the tribal level in the Southwest than in other regions. Midwest grantees, which are primarily Chicago-based, are the most likely to do advocacy work at the city (91 percent) as well as neighborhood (64 percent) levels.

Nine percent of all grantees reported that at least half of their advocacy work was at the federal level; 18 percent reported that at least half of their advocacy work was at the state level. Hence, while our grantees advocated at all levels of government and community, a number of groups concentrated on state and national policy advocacy.

The survey also asked about specific policy campaigns that grantees conducted in 2009. Grantees were requested to report on up to three of the most important policy campaigns in which their organization played a leadership role. They were asked to describe the purpose of the campaign, policy wins or intermediate outcomes, and what strategies they used. Grantees listed 297 individual policy campaigns. We sorted the campaign data by issue, using the eight issues in the Equal Voice National Family Platform, and then by region. The following table shows the results.

■ Number of policy campaigns by issue and region, 2009

Issue	Home State	Midwest	National	South	Southwest	West	Total
Child Care	0	0	0	8	0	2	10
Criminal Justice Reform	1	5	0	9	2	1	18
Education	2	8	2	18	4	15	49
Employment/Job Training	7	8	2	16	5	8	46
Health Care	4	1	3	5	2	10	25
Housing	2	6	1	5	1	6	21
Immigration Reform	11	7	3	4	8	10	43
Safe & Thriving Communities	13	16	4	26	13	13	85
Total	40	51	15	91	35	65	297

The results demonstrate that grantees conducted policy campaigns across all of the issues in the national family platform. Many of these campaigns are ongoing and may have begun well before 2009. The next table presents examples of policy wins that grantees achieved in 2009, recognizing that though a campaign may not achieve a “win,” it is still valuable because of the coalitions built, the leaders developed during the course of the campaign, and increased public awareness regarding the issue the campaign addressed.



Examples of policy wins by issue and region, 2009

Issue	Home State	Midwest	National	South	Southwest	West
Child Care	Secured an additional \$5 million in child care subsidies from stimulus funding					
	Kept parents' child care fees frozen and CalWORKs child care funds from being eliminated from the state budget					
Criminal Justice Reform	Won community-based treatment for mothers convicted of nonviolent offenses					
	Successfully organized to transform a juvenile prison into a treatment-based facility					
	Won revisions to state law to expand the definition of "household member" in domestic violence cases					
	Won the closure of three juvenile correctional institutions					
Education	Won state support for programs and parent outreach to identify and remove barriers to low-income families' enrolling children in preschool					
	Created alternative learning center so that students have access to education during suspensions: achieved positive behavior interventions and supports					
	Parent group forced school district to appoint a committee to hear from parents to develop anti-bullying policies					
	Youth campaign led to school board passage of resolution that Oakland Unified graduates must pass college admissions requirements to graduate					
Employment/ Job Training	Advocated for passage of bill that would fund 5,000 summer jobs for youth statewide					
	Won intermediate term extension of unemployment insurance and benefits					
	Established Mercado Mayapan to create jobs and develop infrastructure for low-income Spanish-speaking women					
	Won some of the strongest greenhouse gas reduction goals of any city in the U.S. as part of Green Collar Jobs campaign					
Health Care	Successfully campaigned to protect funding for state health and human services programs					
	Campaigned for reauthorization of SCHIP and achieved \$35 billion increase allowing millions of new children to be enrolled					
	All Health Children NOW campaign resulted in passage of national legislation to cover uninsured children					
	Indian Health Care Improvement Act was reauthorized as an amendment to health care reform legislation					
	Families advocated for health care services for low-income children and negotiated a two-year contract with Blue Cross and Children's Hospital of Central California					
Housing	Advocated for passage of city of Seattle low-income housing levy					
	Organized tenants in support of several city ordinances that provide increased rights to tenants living in foreclosed buildings					
	St. Bernard Parish agreed to remove from the ballot a referendum regarding a moratorium on construction of multifamily housing from the ballot					
	Created a three-county housing coalition to provide housing relief for families affected by Hurricane Dolly					
	Advocated for extension of rental subsidy time limit to five years to allow more time to find affordable housing and transition off subsidy					
Immigration Reform	Campaigned to stop workplace raids by Immigration and Customs Enforcement					
	Successfully campaigned against the passage of several anti-immigrant bills being considered in the Illinois Legislature					
	Successfully campaigned against the passage of anti-immigrant bills in the state legislature					
	Campaigned against a proposition that prohibits groups receiving state funding to provide adult education services to undocumented immigrants					
	Organized and planned a Community Police Academy to discuss immigrant rights and local law enforcement practices					
Safe & Thriving Communities	Successfully campaigned for anti-predatory lending legislation in the state (a four-year campaign)					
	Successfully campaigned for legislation that reforms campaign- contribution laws in Illinois					
	Successfully advocated for an additional \$5.7 million in the state budget for Department of Rural Services to help small rural communities secure services and needed infrastructure					
	Campaigned for passage of the strongest anti-predatory legislation in the nation					
	Secured city of Los Angeles policy changes to ensure that housing violations are prevented and tenant rights enforced					

The examples cited in the table demonstrate that, in 2009, grantees were able to organize and advocate and put significant pressure on federal, state and local entities – even during an economic downturn – to effect policy changes that had an impact on the lives of low-income families.

Family Engagement

We believe that involvement of families is the fundamental driver for bringing about change within communities. We look to partner with grantee organizations that have a genuine relationship with families and that work to build the capacity of families to act in their own behalf to improve the well-being of all families. How did our grantees involve families in their work in 2009, and what impact did this involvement have on families?

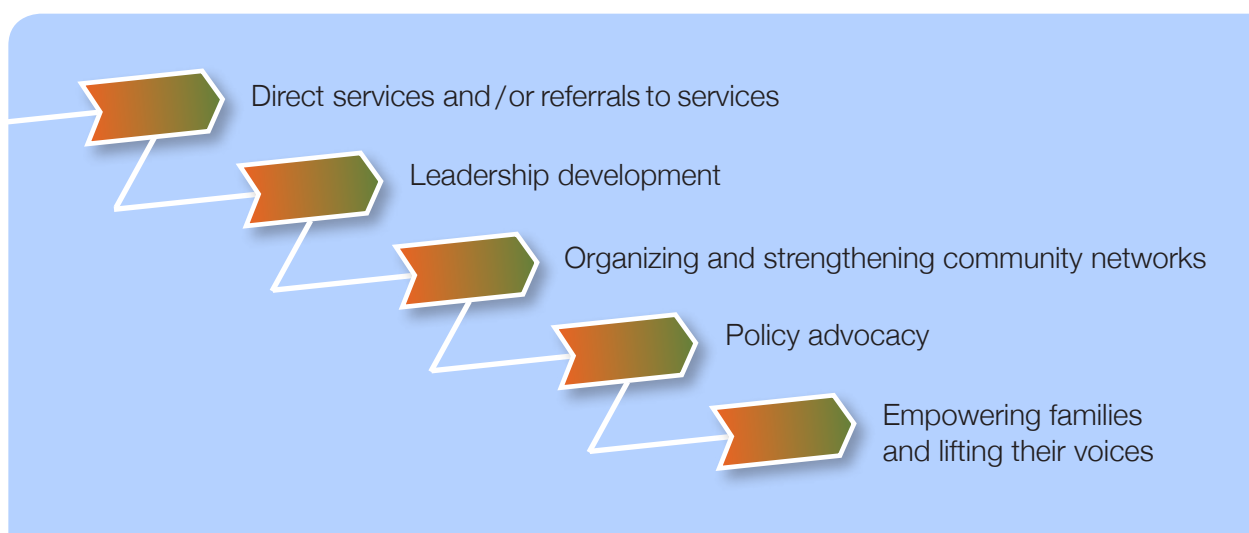
Earlier in this report, we presented the grantees' responses regarding their approaches to developing adult and youth leadership in their communities. Sixty-six percent of the grantees reported that they involved adults from the community as members of boards or advisory boards; 70 percent involved adult constituents in organizational planning; and 60 percent provided adult community members with opportunities to work in their organizations.

Grantees engaged the youth in their communities as well: 62 percent of the grantees reported that they provided youth with opportunities to work in their organizations, 48 percent involved youth in organizational planning, and 32 percent had youth as members of their boards or advisory boards.

More than one-half (59 percent) of the grantees reported that they used foundation support to involve more families in organizational planning and delivery, and 83 percent responded that their general support grant enabled them to reach more community members. It is clear that our grantees not only involved families in their work in 2009 but also, because of foundation support, were able to increase the number of families involved.

Grantees were asked in an open-ended question to discuss how the work of their organization had an impact on families. Several themes emerged from the responses, ranging from the tangible impact of direct services and/or referral to services in the community to the less tangible but crucial impact of empowering families and giving them a voice. The responses may be visualized as a continuum of engagement:

How grantees engaged families, 2009



The following grantee responses demonstrate the range of ways in which grantees engaged families in 2009. Seeing family engagement as a key component of its movement building strategy, Marguerite Casey Foundation continues to seek out groups that work with low-income families and engage them directly.

Direct Services:

- “Because of the downturn in the economy, our job placement program has seen a significant surge in clients seeking employment or simply wanting to enhance their skills to become more employable. We added additional staff to meet the increased demand and consequently we were able to train and place hundreds of applicants who, otherwise, would’ve been left out of the job market.”
- “Our organization is a HUD Certified Housing Counseling Agency and a Civil Legal Service provider. Our housing counselors work with over 100 families each month negotiating loan modifications, re-financing, etc., in an effort to keep low-income families in their homes.”
- “Through our direct immigration legal services we have been able to assist hundreds of women victims of domestic violence obtain permanent resident status in the U.S., get jobs, keep their children, and live independent and productive lives with their families.”
- “Our organization has provided direct services to the community through our free community health clinic, computer literacy classes, youth programming, and public safety programs.”
- “We have found jobs for individuals and have employed some plus increased hours for others because the demand for services is great; we have helped new homeowners get their tax credit; have helped people renew their residency papers, and several received their citizenship papers; have helped many get their health care costs covered by various tactics and have helped many diabetics stabilize.”

Leadership Development:

- “Some 4,000 women in local rural communities across Alabama, Georgia and Mississippi participated in activities to strengthen their skills and knowledge base for advocacy, public policy, and leadership development.”
- “Over 125 parents took the LSNA Parent Mentor training and began their work in school classrooms. Most of the mothers involved in the program have testified that their lives are changed, and their own children’s academic performances improve. By the end of the school year other parents and educators rely on these moms to lead the community to address issues in the school and the surrounding neighborhood.”
- “We provide low-income parents with information and skills on how to navigate the school system, learn the college admission requirements and the importance of planting and watering the seeds of a post-secondary education. Parents learn how to create a learning environment at home and how to advocate ensuring their children get a quality education.”
- “Every community, both large and small, has a set of natural leaders to whom friends and neighbors turn for advice and guidance on local matters. By encouraging and developing those skills, we are building a cadre of local leaders who can mobilize their friends and neighbors to take action on issues that impact their communities.”
- “Families participated in gatherings that strengthened their skill levels around parenting, successful re-entry, careers and financial management. Gatherings also served to strengthen networking relationships and help families to be more connected to resources and advocacy efforts in the community.”

Organizing and Strengthening Community Networks:

- “We have seen community members come to know that they can accomplish meaningful and good things when working together with a common plan. We have seen families work together in their communities, which in turn has strengthened families and strengthened community.”
- “Working families have been impacted by the work of our organization because they have gained organizing skills. Many of them have been mobilized and have witnessed firsthand the power of communities in action.”
- “We created spaces for immigrant families to come together to affirm our right to just treatment while also building organizing skills and countering negative messaging about the immigrant community.”
- “The Hopi Leadership Program participants reported in their final review of their experience that the teachings of the program helped to engage their families in discussions of family values and strength in supporting one another community-wide.”
- “We have increased community support networks for individual families so that they could better weather the bad economy. For example, many of our participants who met each other through our programs have helped each other find work, housing, and have even supported each other economically during hard times.”

Policy Advocacy:

- “Our community organizing efforts empowered more families to successfully advocate for community benefits related to the environment and transportation equity. Families indeed felt more enabled to be actively engaged in public policy decisions that impacted their quality of life.”
- “We worked with low-income families and youth to analyze the Environmental Impact Report for this development project and mobilized hundreds of community members to demand a full clean-up of toxic land. Over 25 low-income youth members realized their power to transform policies that limit educational opportunities for students of color by carrying out a successful campaign for alternatives to suspension and expulsion in public schools.”
- “We impact individual families in our communities by engaging them in the political process, educating them on policies that do/will affect them and teaching them about the democratic process. We have developed multiple community base groups that have begun advocating and recruiting members for themselves throughout the state.”
- “Members have maintained a steady focus on the issue that will make an enormous difference in their lives – comprehensive immigration reform.”
- “We have seen members, youth and adults, becoming more involved in the political process on behalf of their families, schools and communities.”

Empowering Families:

- “Our work gave the families we represent a sense of hope, and an unwavering commitment to equity and justice against all odds.”
- “Families have participated in advocating for change in their communities and truly feel like they are empowered to change their lives.”
- “Families have hope. The community trusts our organization and knows that they can come and learn and be part of civic engagement.”
- “Several leaders who participated in this campaign have expressed how this experience has given them increased confidence and an increased sense of control.”
- “By encouraging and developing these skills we are building a cadre of local leaders who can mobilize their friends and neighbors to take action on issues that impact their communities. This self-help process is central to everything we do and is reflected in the confidence of our members that they can identify the issues that affect their lives and develop solutions to address these issues.”



GRANTEE RELATIONS

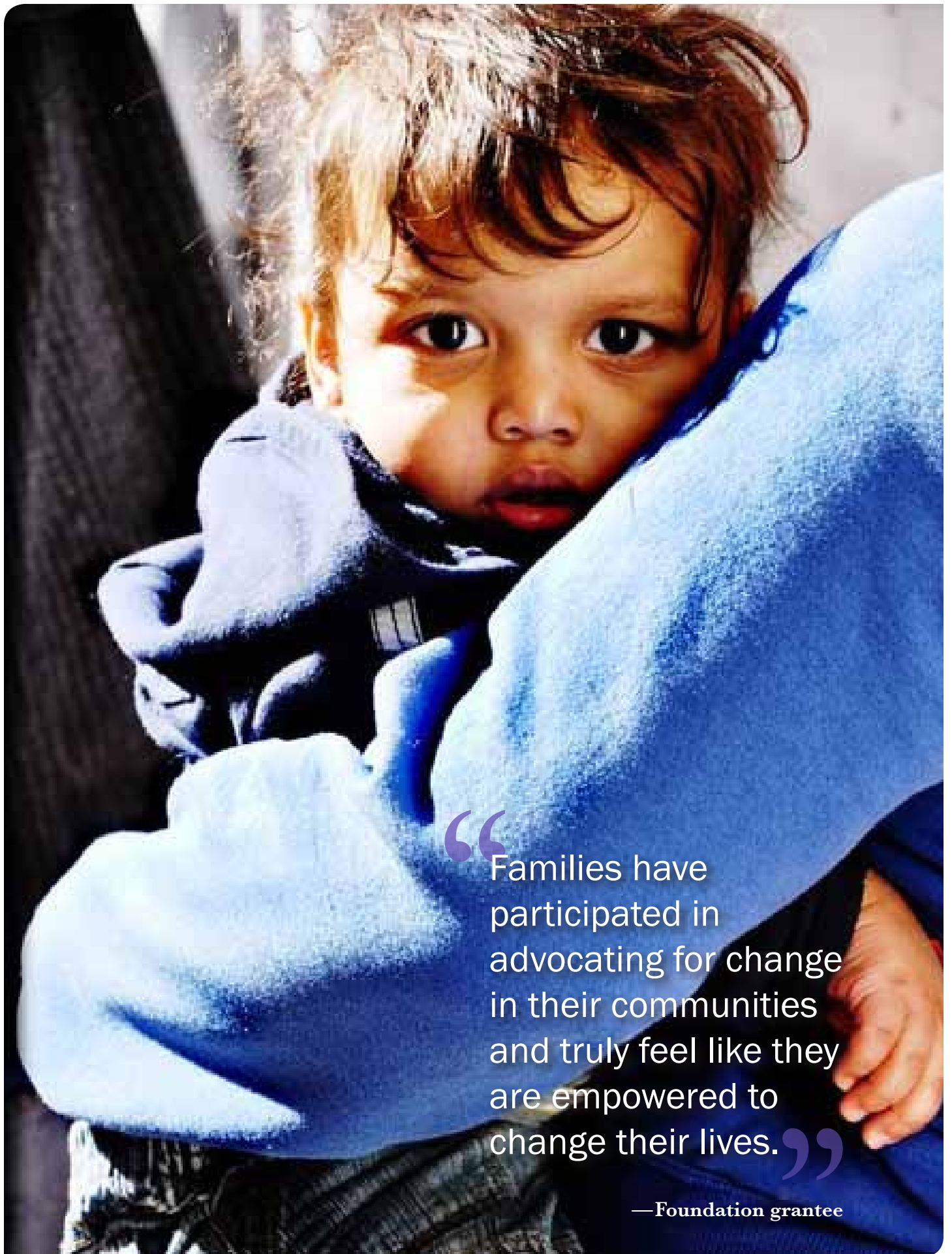
This section assesses how Marguerite Casey Foundation relates to its grantees, and presents data, when available, on how the grantees perceive the foundation. In fall 2009, the foundation commissioned The Center for Effective Philanthropy (CEP) to gather feedback from the foundation's grantees through CEP's assessment tool, the Grantee Perception Report®. The online survey was sent to 241 active grantees in October 2009. Sixty-seven percent of the grantees completed the survey.

The aim of the Grantee Perception Report® is to provide comparative feedback to funders based on the perceptions of grantees. The comparison is to the average and/or median rating for the more than 200 funders in CEP's dataset, as well as to a cohort of 11 other private funders. In addition to a comparison of our ratings to those for other funders, CEP compares the ratings from the 2009 survey to those obtained in a survey conducted in 2006.

The 2009 findings were positive in terms of comparison to other funders and to our ratings in 2006. Key findings include the following:

- Positive qualitative feedback (in the form of grantee comments) along with better ratings—for impact on their fields and organizations, understanding of grantees' goals and strategies, quality of interactions, clarity of communications and helpfulness of the reporting/evaluation process—than those from 2006 indicated that the foundation has improved in the eyes of its grantees since 2006.
- Grantees reported more frequent interaction with the foundation than is typical of the funders in CEP's dataset and rate the quality of those interactions positively.
- The foundation provided a larger proportion of its grantees with nonmonetary assistance (such as management and field-related assistance), as well as support securing funding from other sources, than is typical of the funders in CEP's dataset.
- More than 95 percent of the grantees reported interacting with their program officer at least once every few months. Fifty percent of the Southwest respondents reported monthly or more frequent contact, compared to 20 percent of the West grantees, 10 percent of the Midwest and Home State grantees and 5 percent of the South and National grantees.

The survey results indicate that the foundation has moved in a desirable direction of frequent, quality interaction with grantees; the perception of clear communications and expectations; impact on grantee organizations; and the provision of assistance beyond the grant. What the Grantee Perception Report®, as a standardized instrument, cannot assess are the unique ways in which the foundation relates to its grantees. Examples of those unique interactions include our annual convening, and our myriad communications resources. We plan to explore the development of a customized instrument that will allow us to assess over time the breadth and depth of our partnership with our grantees.



“Families have participated in advocating for change in their communities and truly feel like they are empowered to change their lives.”

—Foundation grantee

LEARNING *and* IMPROVEMENT

The assessment of our grantmaking suggests several important implications about the impact of general operating support, the activities in which grantee organizations have engaged and the outcomes they have achieved:

- Our grantee organizations built capacity with general operating support. Such support was instrumental in sustaining organizations during the economic downturn.
- Grantee organizations are developing community members, both adults and youth, as leaders empowered to engage in policy change.
- Grantees have made it a priority to collaborate with other organizations and build partnerships to maximize their impact; this approach extends to the business and public sectors as well.
- Grantee organizations are conducting policy campaigns to bring about change at all levels of government or community and are achieving wins across a multitude of issues that affect low-income families.
- Grantees engaged families to the degree that low-income families across the country are empowered to bring about change in the issues that affect families.

Refinements Made to Grantmaking in 2009

In 2009, we made a number of refinements to our grantmaking:

- We implemented changes to the Home State Fund that resulted in fewer grants awarded but substantially higher grant amounts to each organization.
- We added two states (Kentucky and Tennessee) to our South portfolio with the goal of expanding the diversity of the constituencies in this region.
- We made a commitment to expand the number of grantee organizations in Arizona.
- We provided small (up to \$30,000) mini-grants to 18 active grantees that were involved in multi-organization network efforts that emerged from the 2008 Equal Voice for America's Families campaign.

Looking Ahead

We plan to use the information presented in this annual impact assessment report as part of a yearly benchmarking process. We will track how our cohort of grantee organizations performs on the indicators of movement building outlined in this report. Finally, we will place this assessment in the context of how families are faring across the country because, ultimately, the well-being of all of America's families is our greatest concern.

Grantmaking Context

DEMOGRAPHIC DATA *and* INDICATORS *of* FAMILY WELL-BEING

The grantmaking context information presented in this section of the report comprises demographic data and selected indicators of family well-being. The indicators allow us to assess how families are doing in the areas of economic security, and educational attainment and achievement. We do not assume that changes from year to year in these important indicators are directly attributable to our and our grantees' work, but they do offer some context for viewing both the challenges the families face and possible improvements in conditions to which our grantees have contributed.

Demographic information - including population size, number of families with children, number of children, racial and ethnic composition and rurality - is presented for the nation as a whole and for each of the 14 states in our grantmaking regions. Although the foundation did not add Kentucky and Tennessee to its South region until 2010, we have included them here to provide a comparable baseline as we look for changes in family well-being from year to year.

The demographic information and that for the indicators have been collected from publicly available data sources. The specific indicators for which we have compiled data and the sources for those data are:

- Families Below Poverty Level, 2008 (*U.S. Census Bureau*)
- Low-Income Families With Children, 2008 (*National Center for Children in Poverty*)
- Low-Income Children, 2009 (*National Center for Children in Poverty*)
- Low-Income Families With Parent Employed Full-Time (*National Center for Children in Poverty*)
- Families in Asset Poverty, 2006 (*Corporation for Enterprise Development*)
- Households That Receive Food Stamps, 2008 (*American Community Survey*)
- Children Without Health Insurance, 2008 (*Henry J. Kaiser Family Foundation*)
- 4-Year-Olds Enrolled in State-Funded Preschool Programs, 2008 (*National Institute for Early Education Research*)
- Parental Education, 2008 (*National Center for Children in Poverty*)
- Public High School Graduation Rate, 2008 (*National Center for Education Statistics*)
- Young Adults Enrolled in or Completed College, 2008 (*National Center for Education Statistics*)
- Reading Proficiency by National School Lunch Program Eligibility for Grades 4 and 8, 2009 (*National Center for Education Statistics*)
- Mathematics Proficiency by National School Lunch Program Eligibility for Grades 4 and 8, 2009 (*National Center for Education Statistics*)

In 2008, the federal poverty threshold for a family of four in the United States was approximately \$21,850. It is accepted that families actually need an income that is equal to twice the federal poverty level to meet their basic needs. Families who have incomes that are less than 200 percent of the federal poverty line (approximately \$43,700 for a family of four) are considered to be low-income. Asset poverty refers to the inability of a family to sustain its household at the federal poverty line for more than three months without income. Asset-poor families are especially vulnerable to job loss and cuts in work hours and income.

Reading and mathematics proficiency were measured with the National Assessment of Educational Progress (NAEP) tests. These tests, which are administered to students every two years, are the only standardized measure of student performance that is uniform across states. The focus for this report is on the percentage of students in the fourth and eighth grades who perform at or above proficiency for reading and mathematics. Further, the differences in performance between students who are eligible for free/reduced-price school lunch (family income at or below 185 percent of the federal poverty level) and those who are not eligible are graphed.

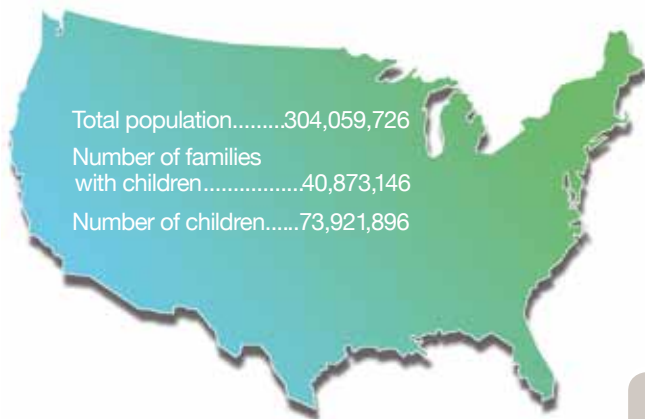
Profiles for the United States and each of the grantmaking states follow. The state profiles are presented by region in the following order:

- Home State: *Washington*
- Midwest: *Illinois*
- South: *Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, Tennessee*
- Southwest: *Arizona, New Mexico, Texas*
- West: *California*

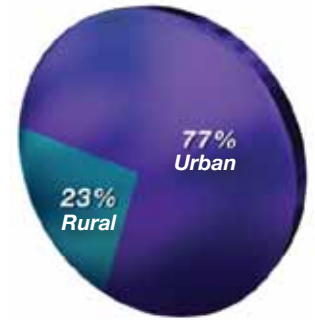
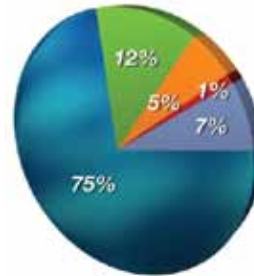


United States

Demographics



Population by race and ethnicity

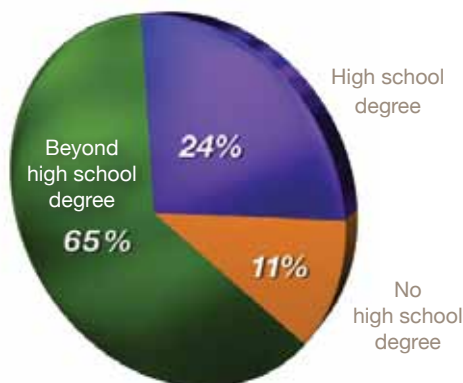


Rurality of population

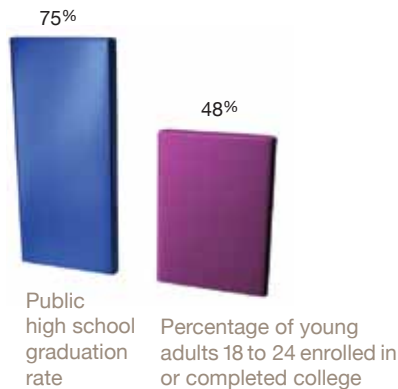
Indicators of family well-being



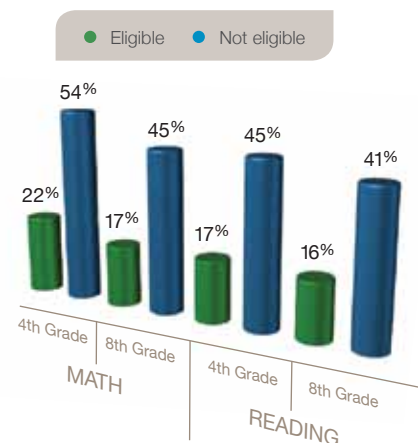
Parental education



Young adult educational attainment



Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



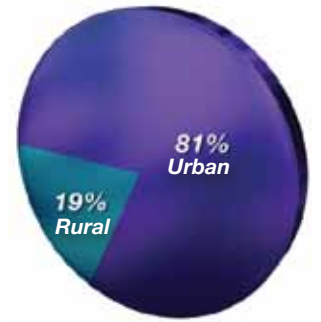
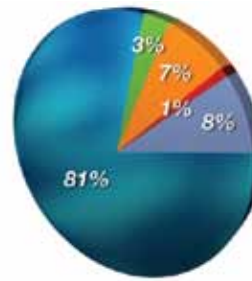
NOTE: 2008 figures unless indicated otherwise

Washington State

Demographics



Population by race and ethnicity



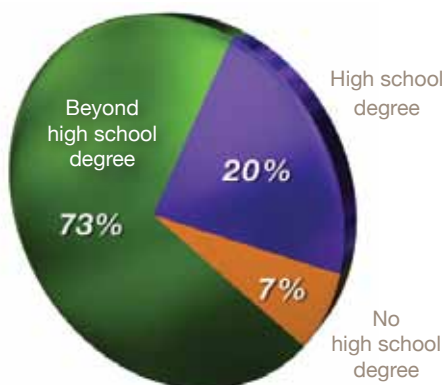
Rurality of population



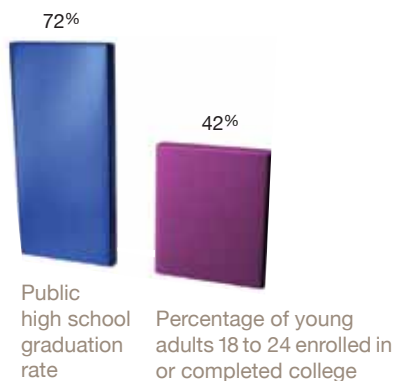
Indicators of family well-being



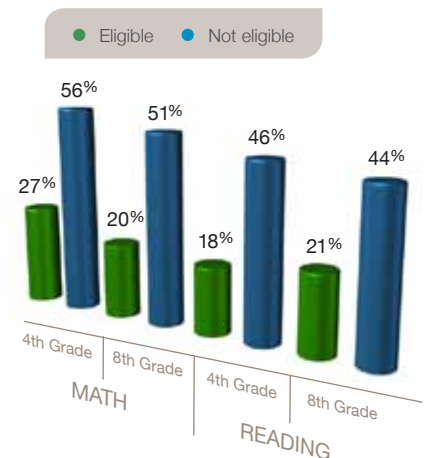
Parental education



Young adult educational attainment

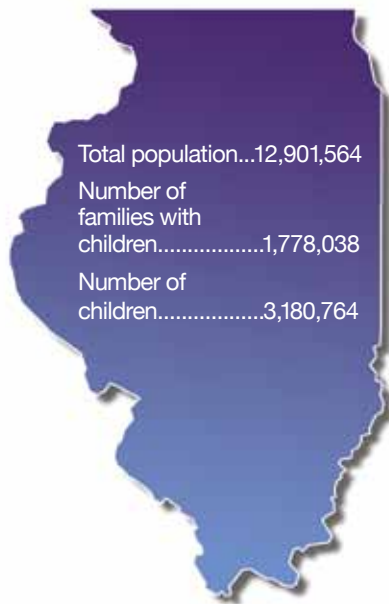


Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009

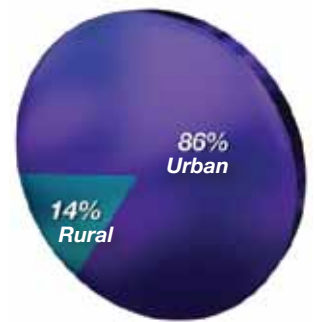
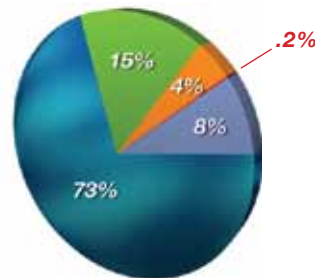


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Demographics



Population by race and ethnicity

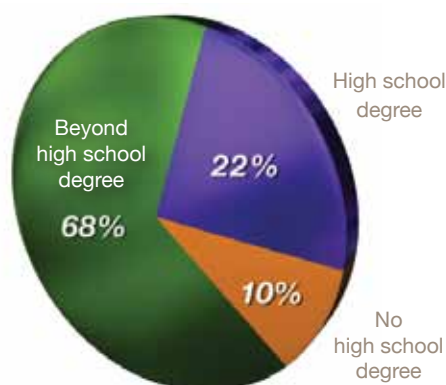


Rurality of population

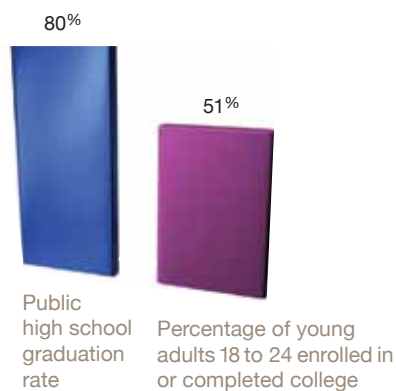
Indicators of family well-being



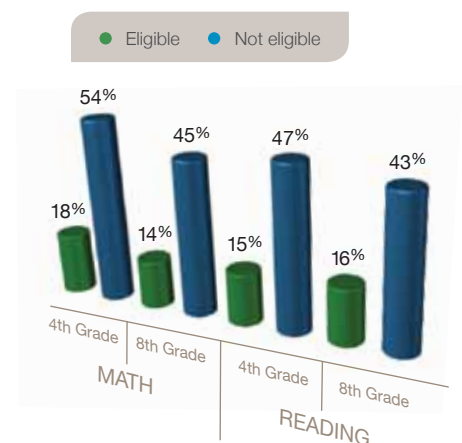
Parental education



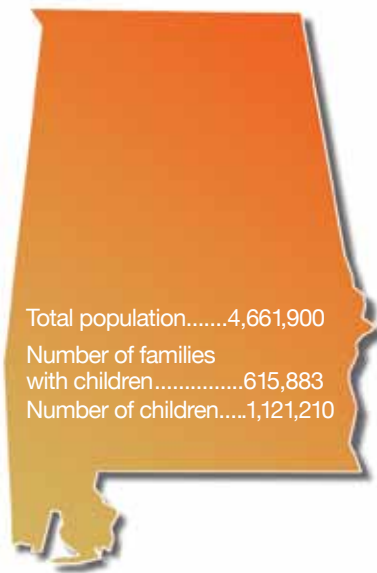
Young adult educational attainment



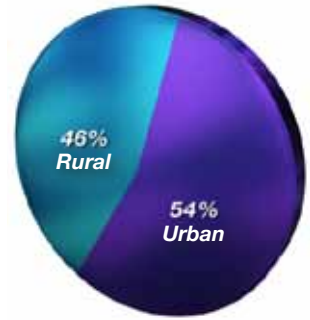
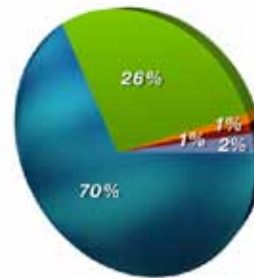
Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



Demographics



Population by race and ethnicity

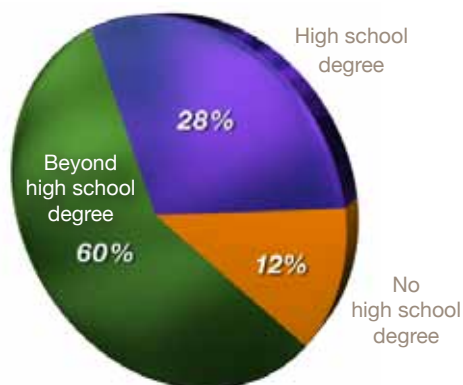


Rurality of population

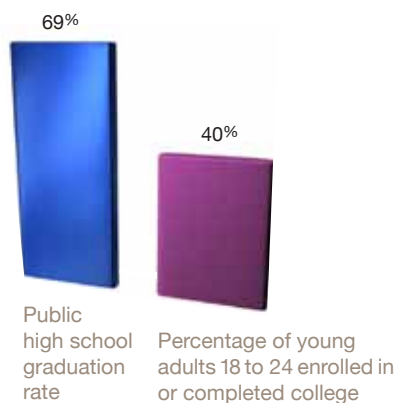
Indicators of family well-being



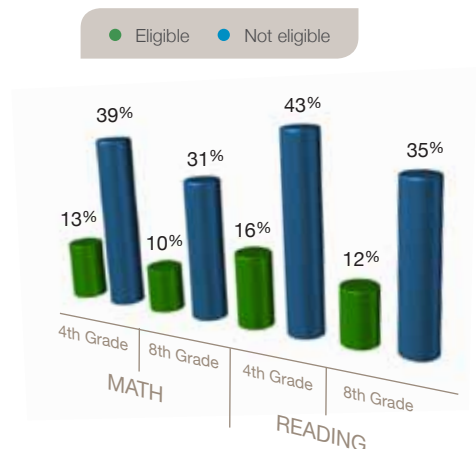
Parental education



Young adult educational attainment



Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



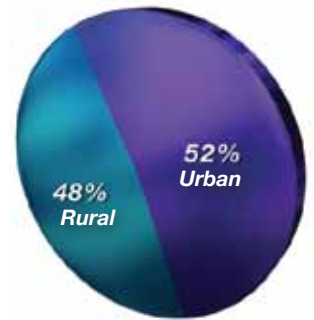
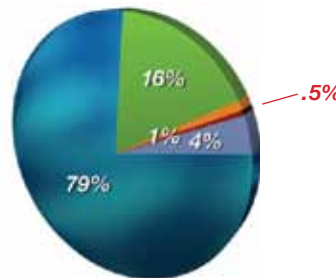
NOTE: 2008 figures unless indicated otherwise

Arkansas

Demographics



Population by race and ethnicity

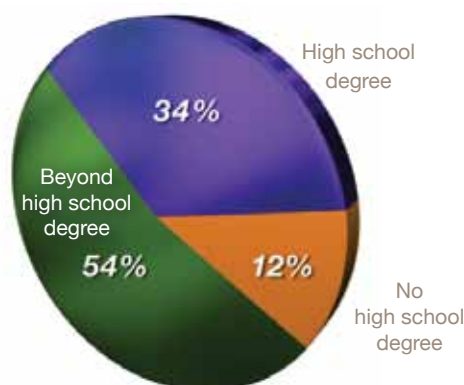


Rurality of population

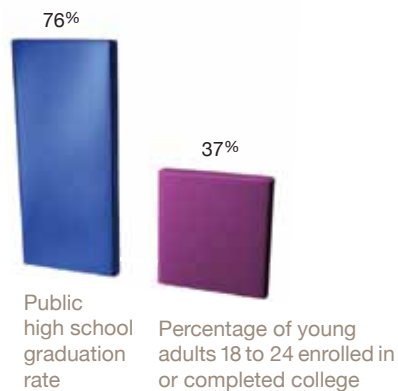
Indicators of family well-being



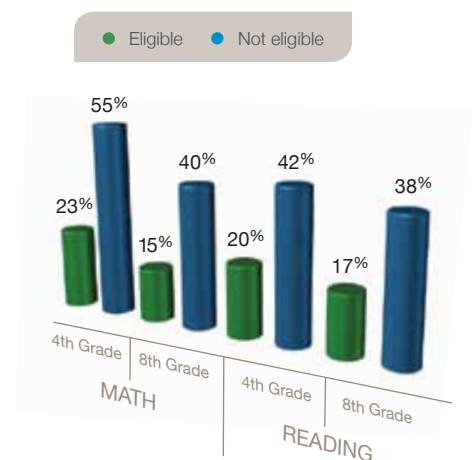
Parental education



Young adult educational attainment

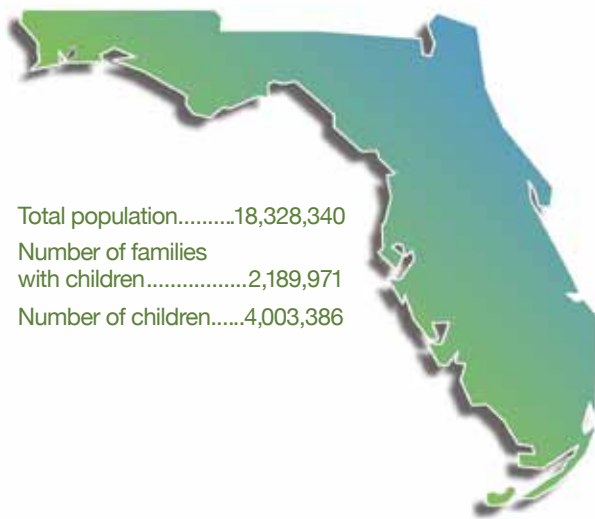


Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009

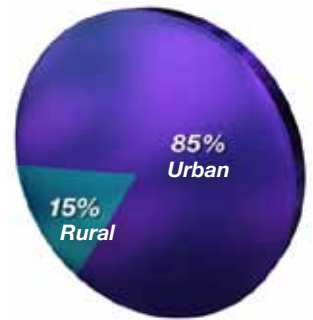
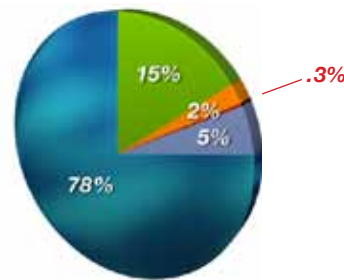


NOTE: 2008 figures unless indicated otherwise

Demographics

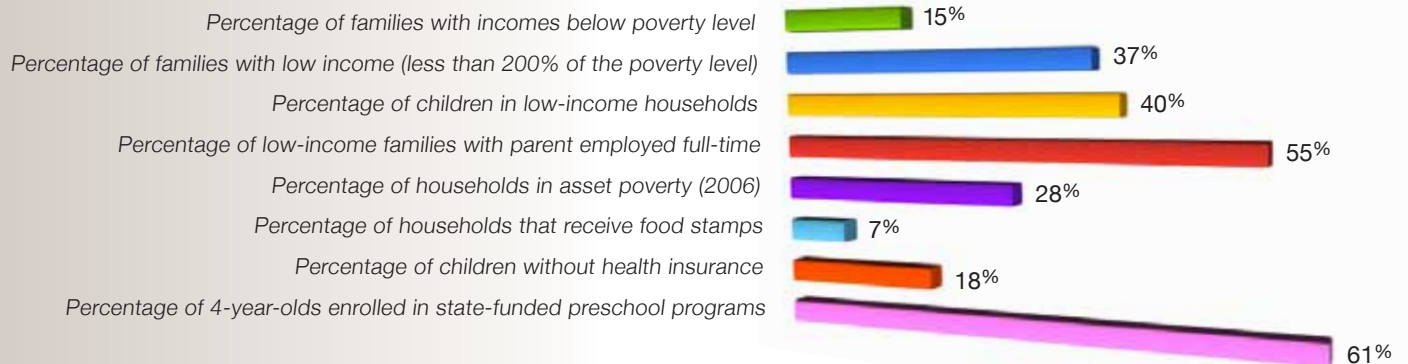


Population by race and ethnicity



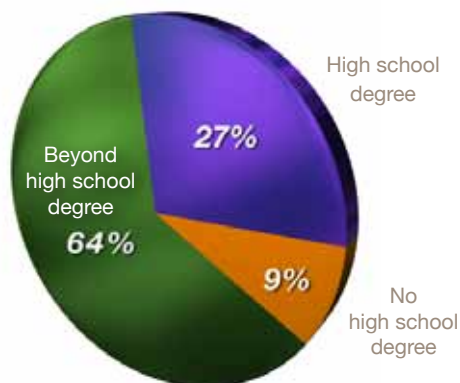
Rurality of population

Indicators of family well-being

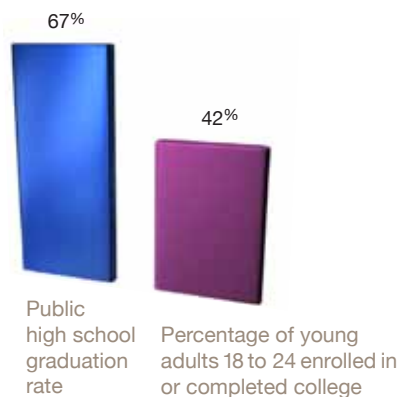


Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009

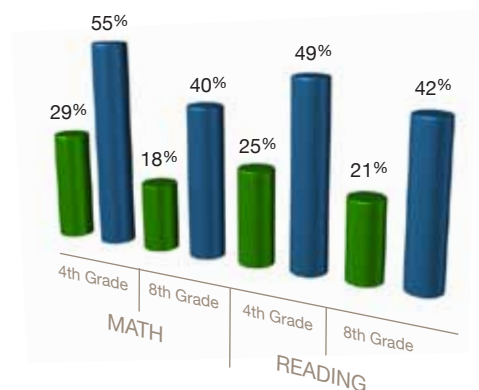
Parental education



Young adult educational attainment

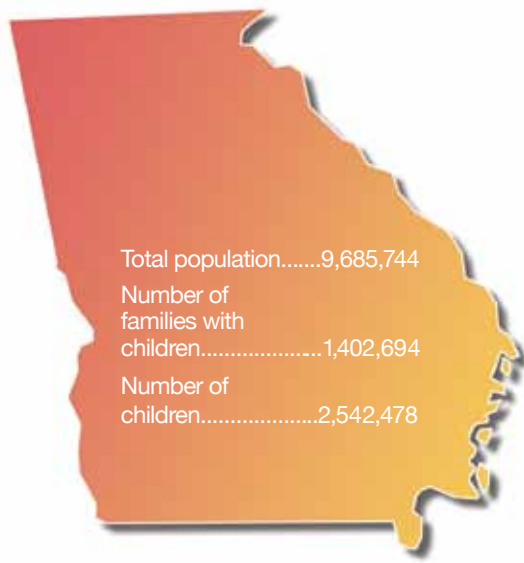


Eligible Not eligible

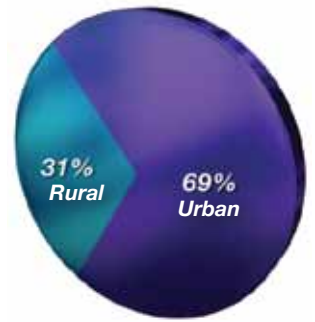
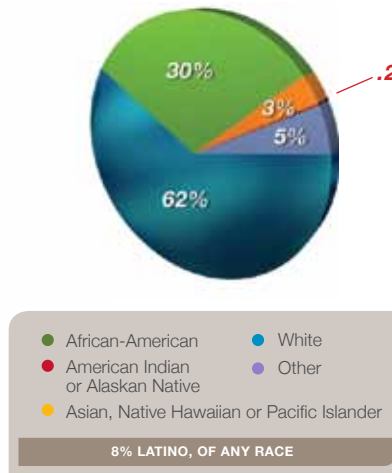


Georgia

Demographics



Population by race and ethnicity

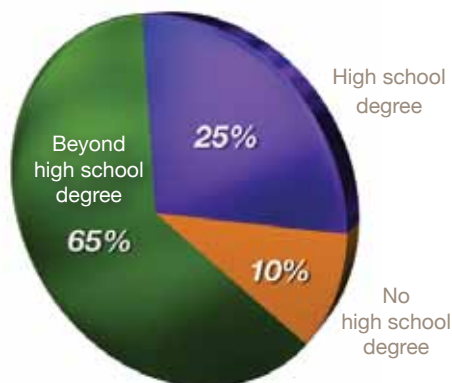


Rurality of population

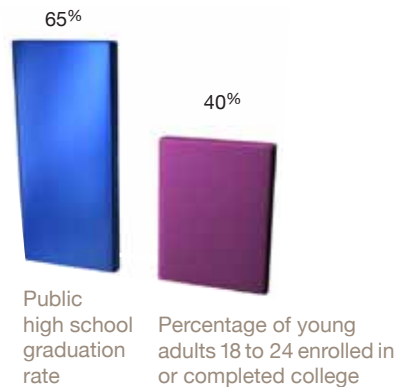
Indicators of family well-being



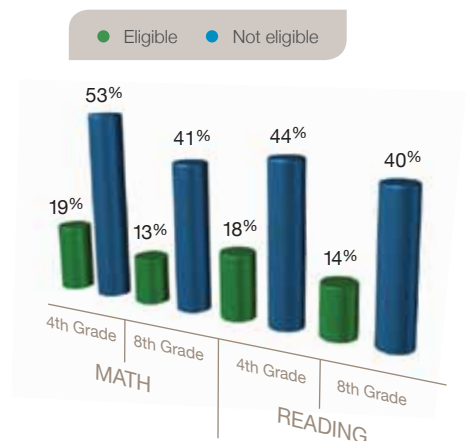
Parental education



Young adult educational attainment



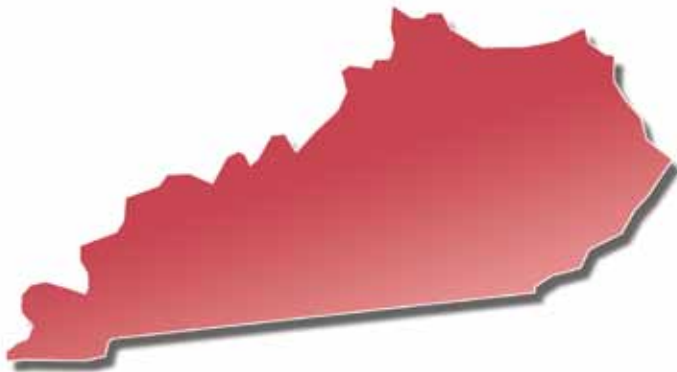
Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



NOTE: 2008 figures unless indicated otherwise

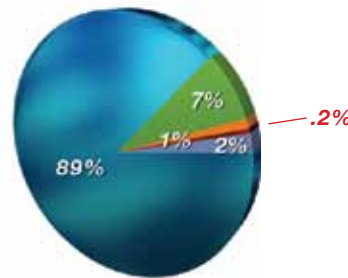
Kentucky

Demographics

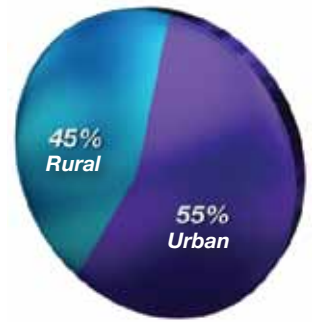


Total population.....4,269,245
 Number of families
 with children.....581,270
 Number of children.....1,008,539

Population by
 race and ethnicity



● African-American ● White
 ● American Indian or Alaskan Native ● Other
 ● Asian, Native Hawaiian or Pacific Islander
 2% LATINO, OF ANY RACE



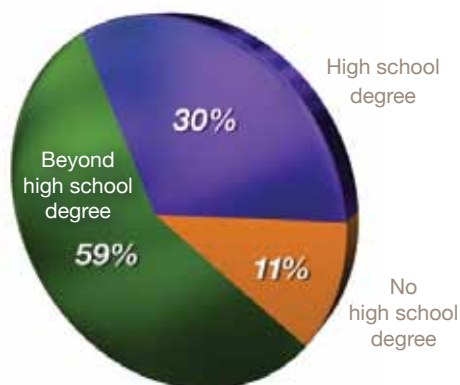
Rurality of population

Indicators of family well-being

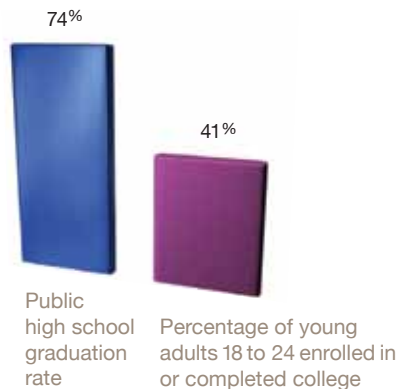


Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009

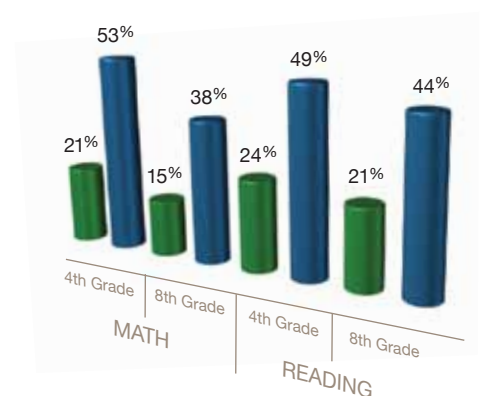
Parental education



Young adult educational attainment



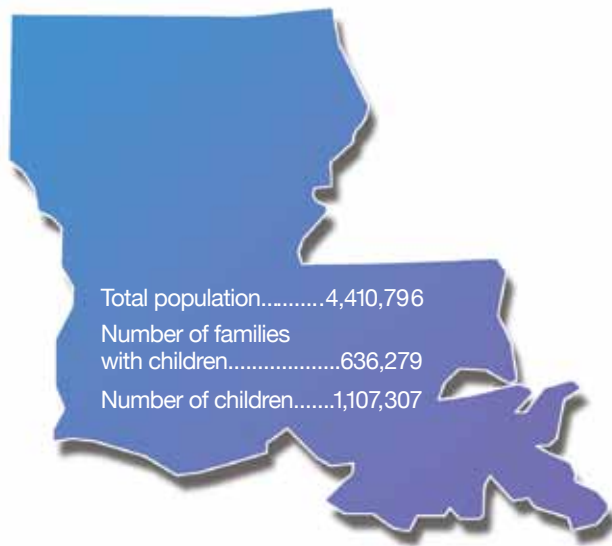
● Eligible ● Not eligible



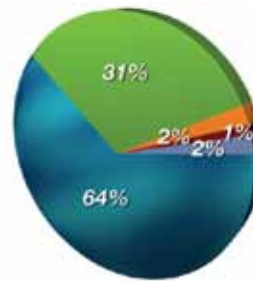
NOTE: 2008 figures unless indicated otherwise

Louisiana

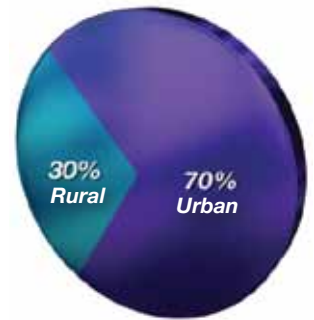
Demographics



Population by race and ethnicity



3% LATINO, OF ANY RACE

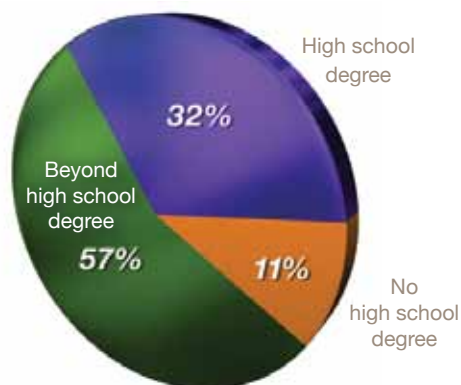


Rurality of population

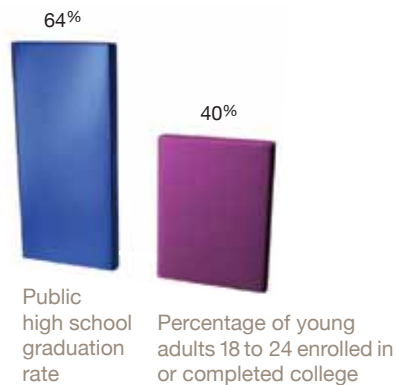
Indicators of family well-being



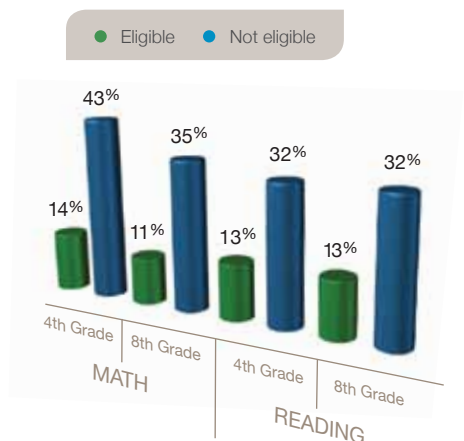
Parental education



Young adult educational attainment



Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



NOTE: 2008 figures unless indicated otherwise

Mississippi

Demographics

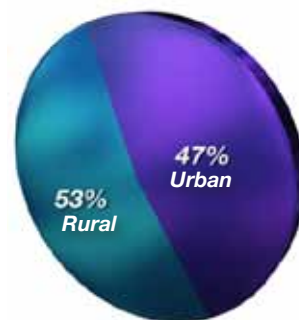
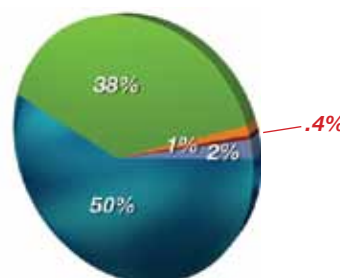
Total population.....2,938,618

Number of families
with children.....
.....413,227

Number of children...
.....765,290



Population by race and ethnicity



Rurality of population

Indicators of family well-being

Percentage of families with incomes below poverty level

Percentage of families with low income (less than 200% of the poverty level)

Percentage of children in low-income households

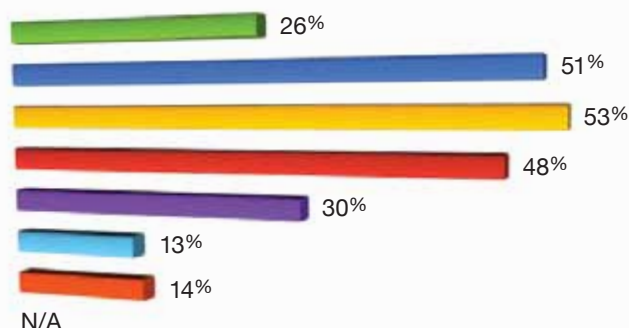
Percentage of low-income families with parent employed full-time

Percentage of households in asset poverty (2006)

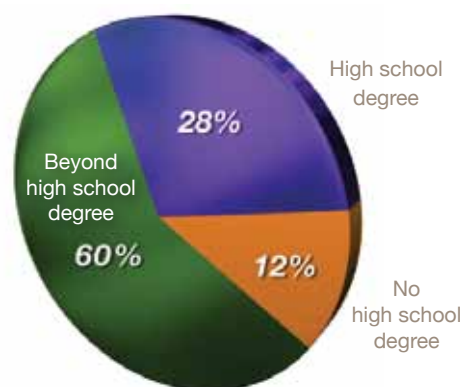
Percentage of households that receive food stamps

Percentage of children without health insurance

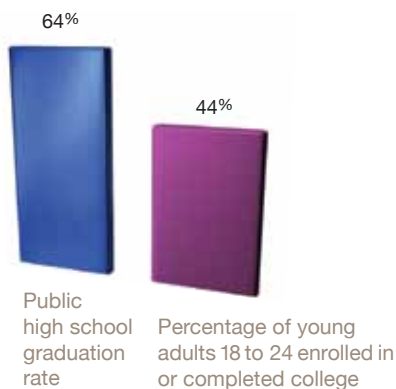
Percentage of 4-year-olds enrolled in state-funded preschool programs



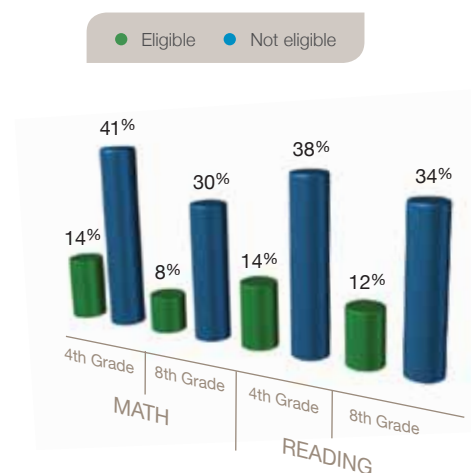
Parental education



Young adult educational attainment



Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



NOTE: 2008 figures unless indicated otherwise

Tennessee

Demographics

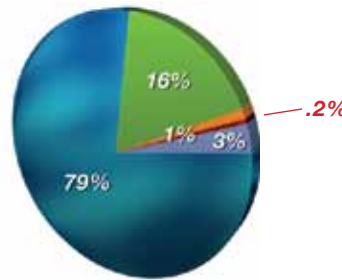


Total population.....6,214,888

Number of families
with children.....826,615

Number of children.....1,478,901

Population by
race and ethnicity

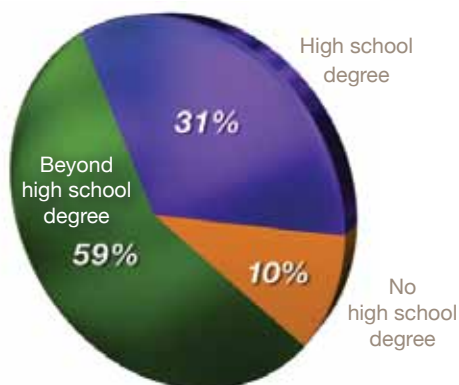


Rurality of population

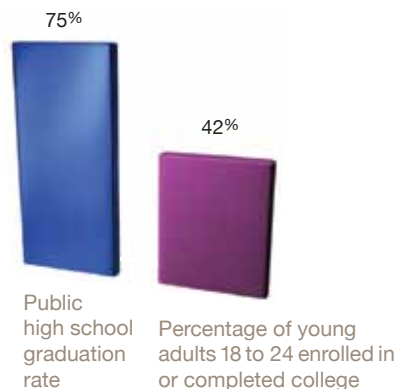
Indicators of family well-being



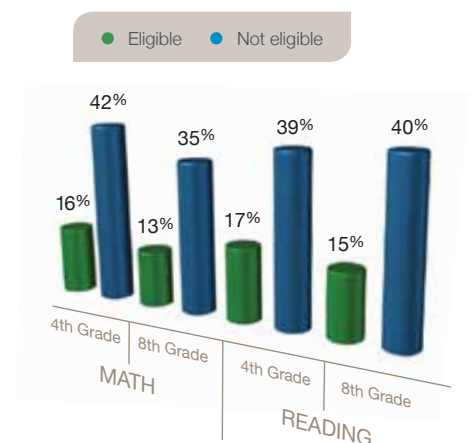
Parental education



Young adult
educational attainment



Percentage of 4th and 8th
graders performing at or above
proficiency for reading and math by National
School Lunch Program eligibility, 2009

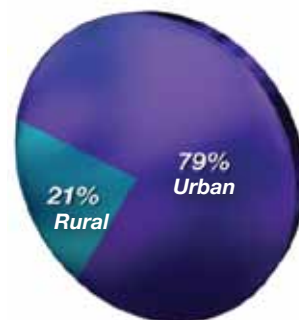
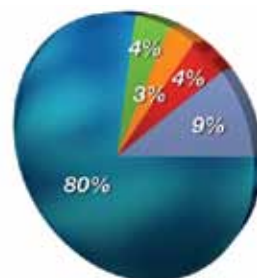


NOTE: 2008 figures unless indicated otherwise

Demographics



Population by race and ethnicity



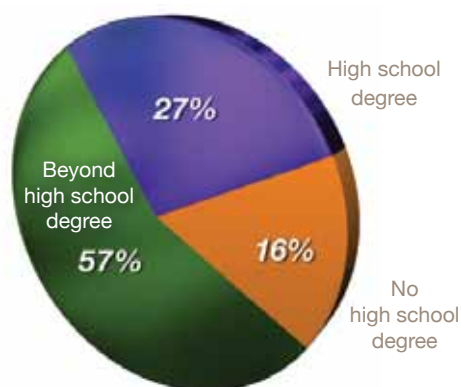
Rurality of population

Indicators of family well-being

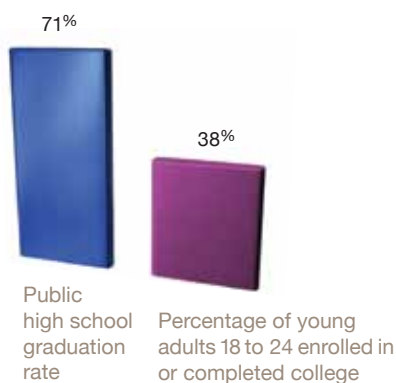


Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009

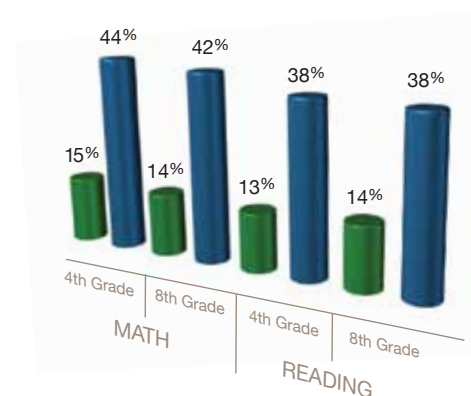
Parental education



Young adult educational attainment



Eligible Not eligible

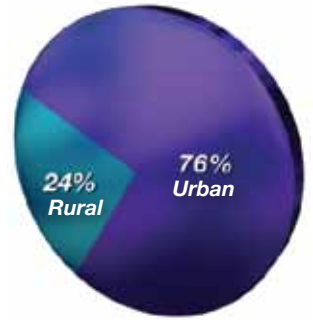
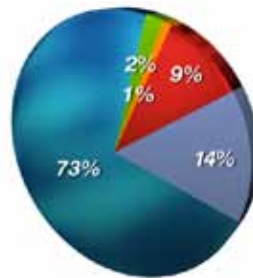


New Mexico

Demographics



Population by race and ethnicity

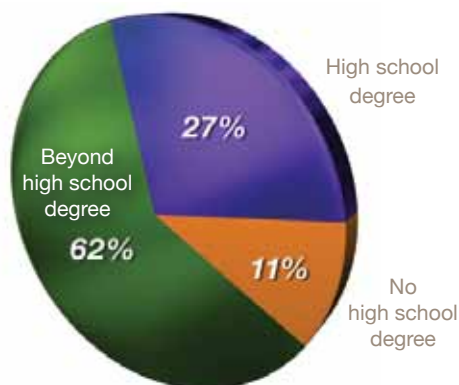


Rurality of population

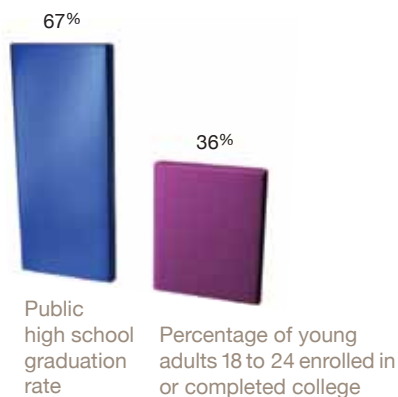
Indicators of family well-being



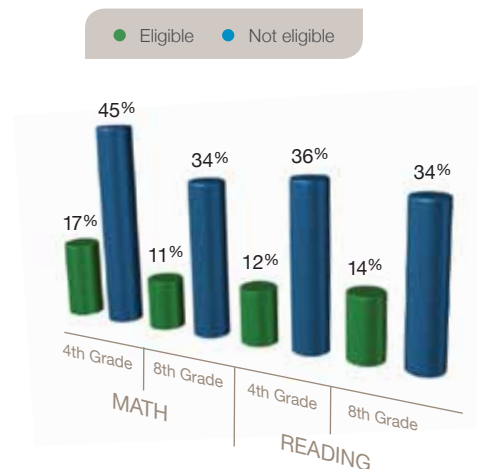
Parental education



Young adult educational attainment

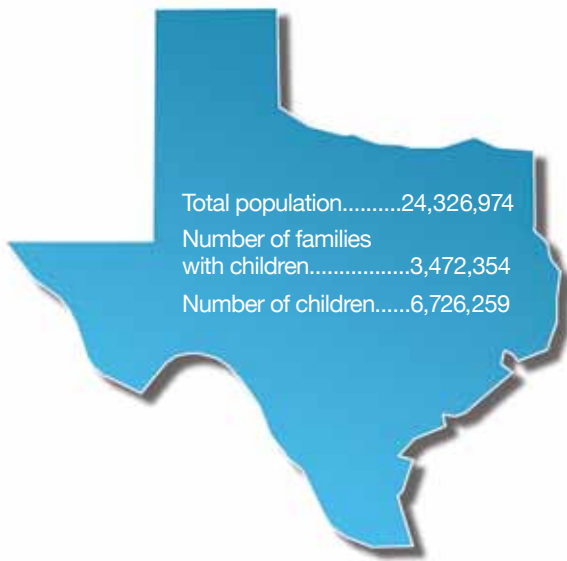


Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009

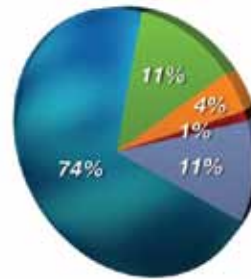


NOTE: 2008 figures unless indicated otherwise

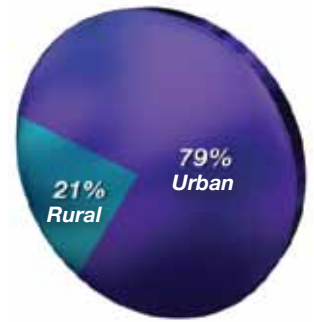
Demographics



Population by race and ethnicity



37% LATINO, OF ANY RACE

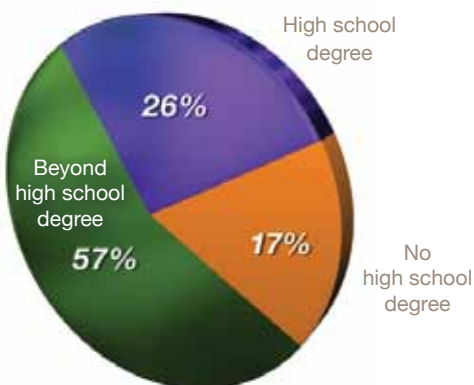


Rurality of population

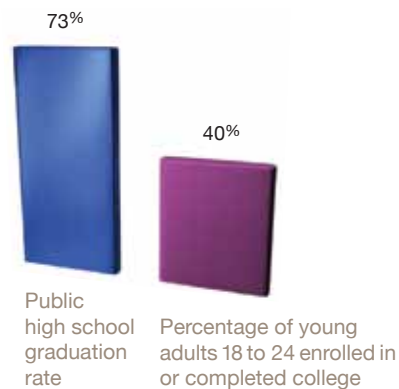
Indicators of family well-being



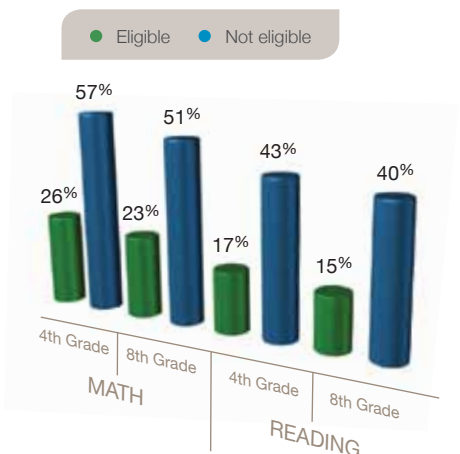
Parental education



Young adult educational attainment



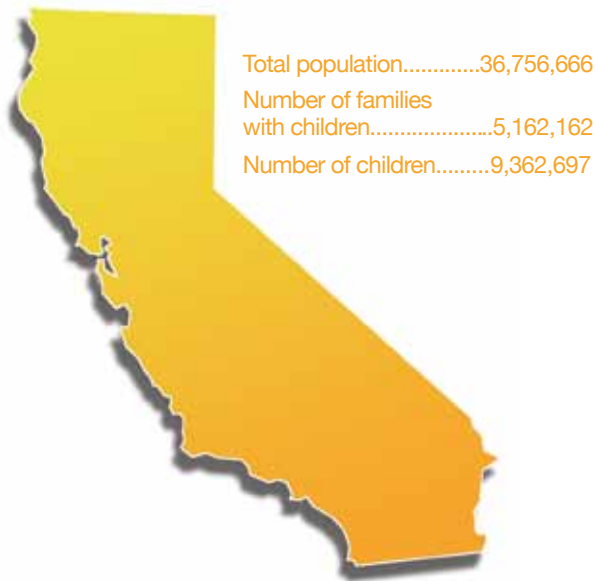
Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



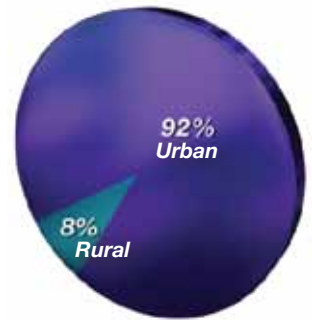
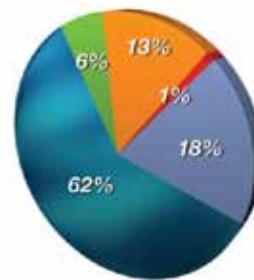
NOTE: 2008 figures unless indicated otherwise

California

Demographics



Population by race and ethnicity



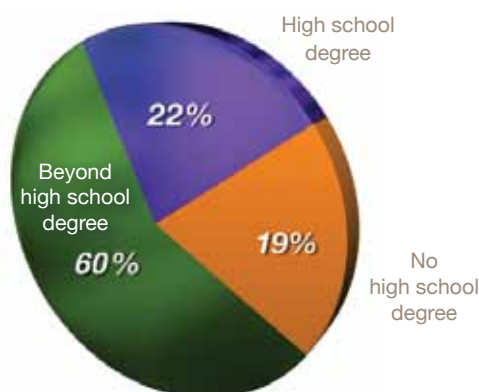
Rurality of population

Indicators of family well-being

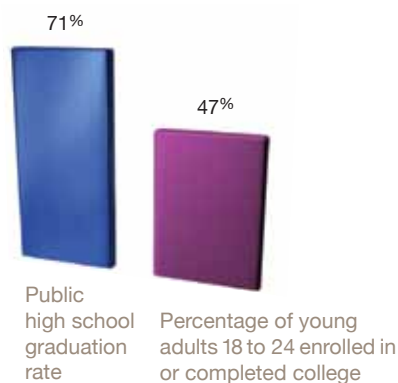


Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009

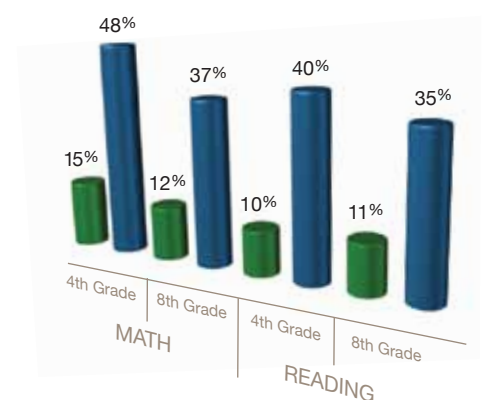
Parental education



Young adult educational attainment



Eligible Not eligible



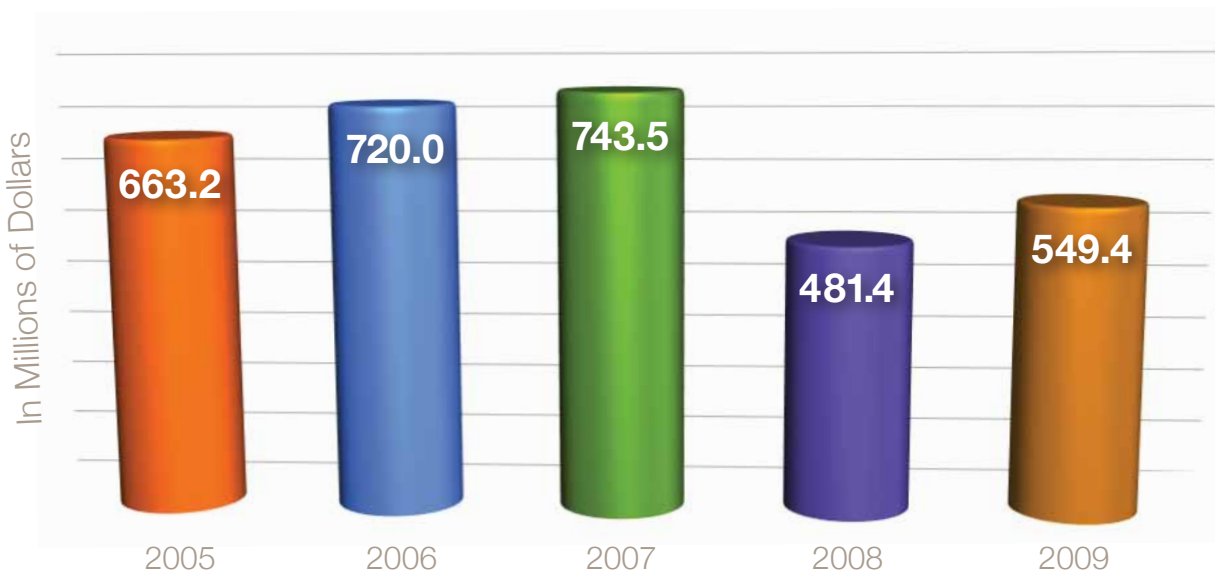
NOTE: 2008 figures unless indicated otherwise

Financial Operations

ASSETS

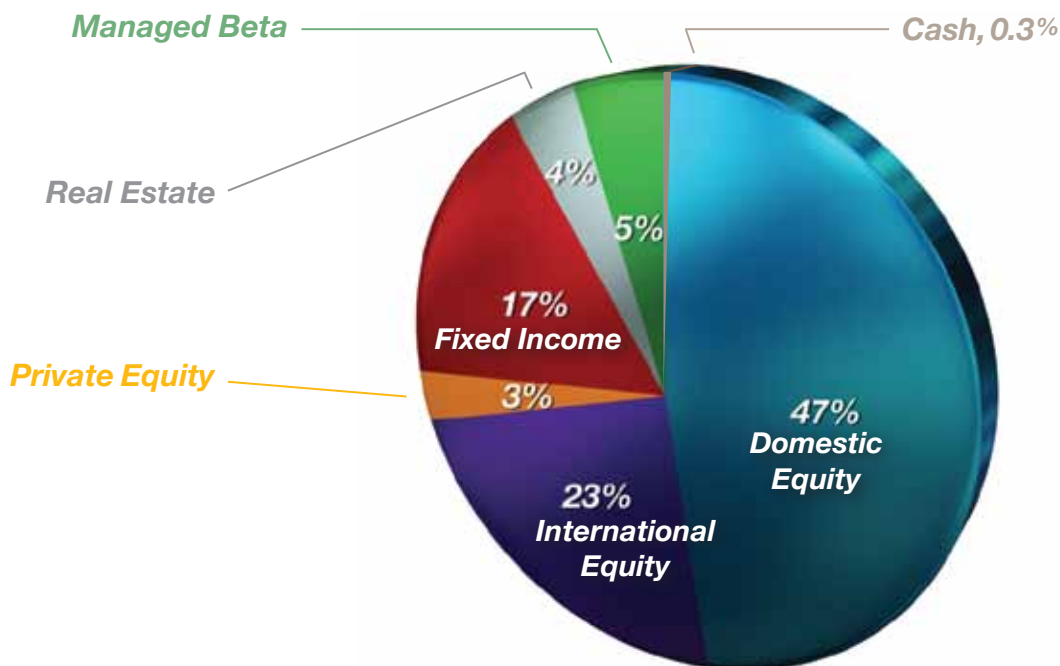
The chart below shows the foundation's assets at the end of each of the past five calendar years. Our assets declined significantly in 2008 in the midst of the general recession, but recovered somewhat in 2009.

Assets (\$ in millions)



INVESTMENT ALLOCATION

The chart below shows the investment allocation for the foundation's portfolio as of Dec. 31, 2009.



EXPENDITURES

The table below shows the amount expended each year on grantmaking for the years 2005-2009. Foundation spending peaked in 2008 with the Equal Voice for America's Families conventions. With the reduction in foundation assets during the economic downturn, our spending in 2009 was more conservative, but the foundation was able to continue to meet its obligations to grantees.

■ Grants and charitable program services expenditures, 2005—2009

Year	Grants and Charitable Program Services
2005	\$28,616,000
2006	\$23,820,000
2007	\$29,654,000
2008	\$32,190,000
2009	\$23,157,000

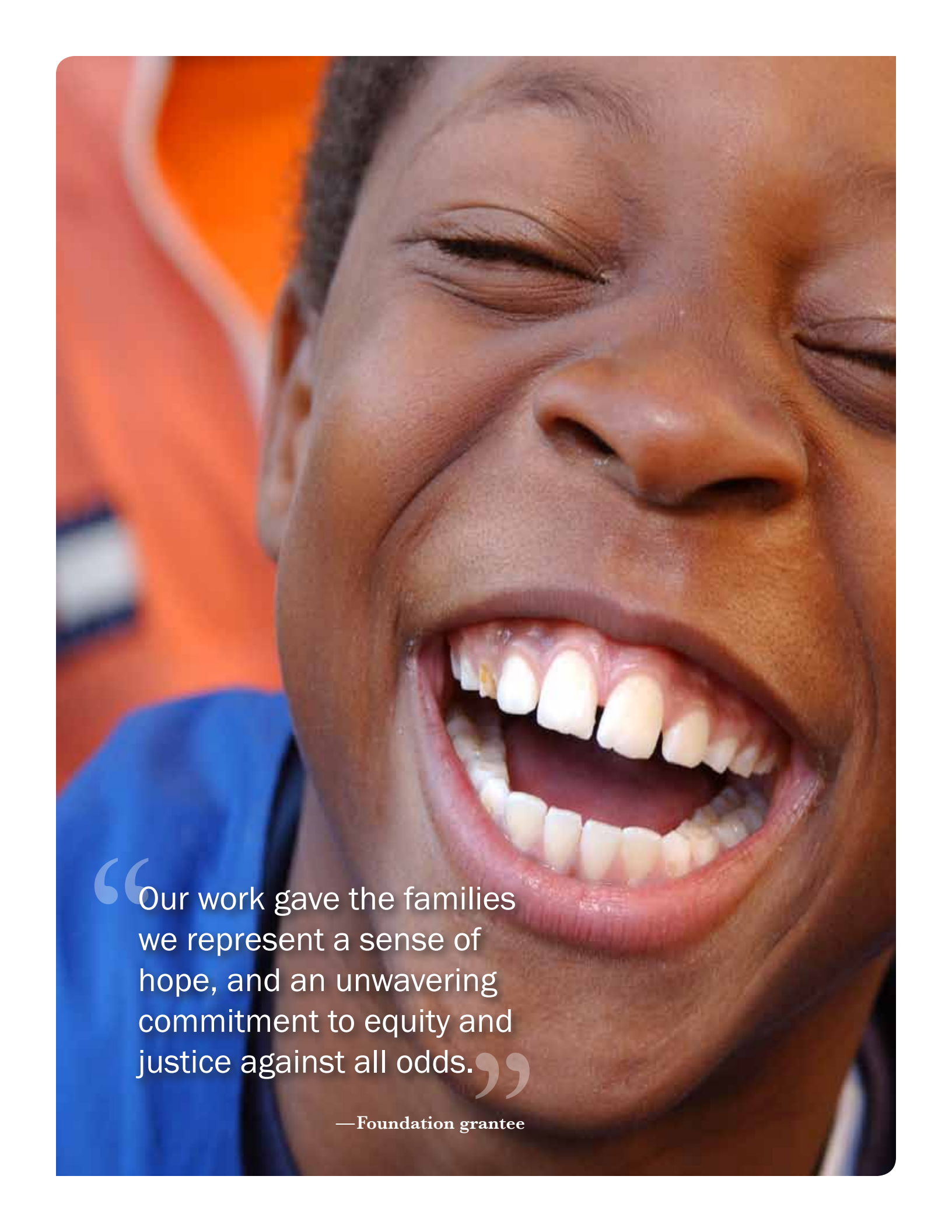


The following table and accompanying chart show the breakdown of expenses in 2009. Expenditures on grants and other charitable program services accounted for 80 percent of total expenses in 2009.

Total expenses, 2009

Expenses	Dollar Amount
Grants and charitable program services	\$23,157,000
Compensation and benefits	\$2,875,000
Operations and support services	\$1,431,000
Investment expenses and excise tax	\$1,560,000
Total expenses	\$29,023,000





“Our work gave the families
we represent a sense of
hope, and an unwavering
commitment to equity and
justice against all odds.”

—Foundation grantee

Board of Directors and Staff

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About Marguerite Casey Foundation

Marguerite Casey Foundation is dedicated to creating a movement of working families advocating on their own behalf for change. We strive to bring humility and hope to our work. Our actions are guided by the firm belief that significant positive change is not only possible, but absolutely necessary. Within this framework, we seek to do the following:

- ✓ **Support and nurture strong, vibrant activism within and among families**, enabling them to advocate for their own interests and improve the public and private systems that impact their lives.
- ✓ **Examine, change and inform the advancement of social and economic policies and practices** that promote the development of strong families and strong communities.
- ✓ **Encourage the development of a coherent knowledge base** for advocates, families and the organizations that serve them.
- ✓ **Invest in system change and cross-system change** in order to generate greater knowledge and provide effective working models for practice.

